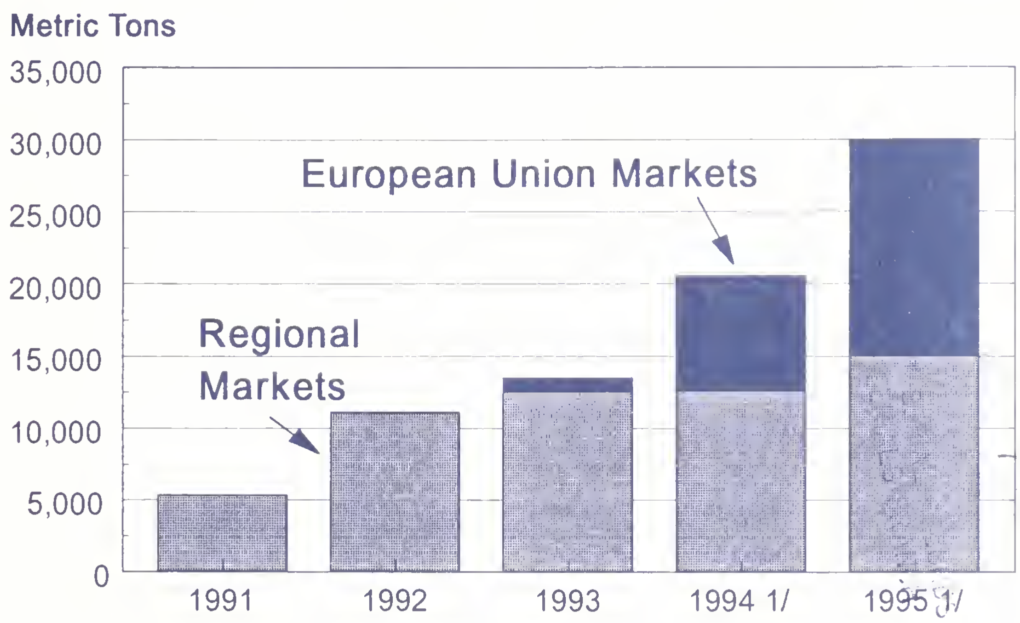
Foreign
Agricultural
Service

Circular Series
FHORT 5-94
May 1994

World Horticultural Trade & U.S. Export Opportunities

INDIA'S TABLE GRAPE EXPORTS RISE AS EXPORT MARKETS DIVERSIFY



1/ Forecast.

Source: Combination of Government of India and USDA/FAS data.
Note: Regional markets include Bangladesh, UAE, and Saudi Arabia. European Union markets for 1993 include United Kingdom; for 1994 and 1995, includes additional EU countries.

India's expanding export grape industry has evolved over the past few years and has diversified its markets. Traditionally a supplier of grapes to regional markets, India recently began shipping high-quality Thompson seedless grapes to the U.K. and other EU countries. This effort has been assisted by the government's economic reform and policy measures that target export-oriented industries. **[For further details on the outlook for competition from India's horticultural industry, see article on page 8.]**

Approved by the World Agricultural Outlook Board - USDA

For further information, contact:
U.S. Department of Agriculture
Foreign Agricultural Service
Horticultural and Tropical Products Division
AG Box 1049
Washington, DC 20250-1049

Telephone: 202-720-6590
Fax: 202-720-3799

Frank J. Piason, Director
Howard R. Wetzel, Deputy Director for Analysis
Robert B. Tisch, Acting Deputy Director for Marketing

ANALYSIS

Casey Bean	202-720-4620	Fresh deciduous fruit, apple juice, olives, and Asia-specific issues
Brian Grunenfelder	202-690-2702	Trade policy, food safety, and plant health group leader
Craig Jenkins	202-720-6086	Canada-specific issues, berries, and PL-480
Ross Kreamer	202-720-9903	Canned deciduous fruit, wine, table grapes, kiwifruit, beer, hops, NAFTA, and GSM-102 export credits
Emanuel McNeil	202-720-2083	Fresh and processed vegetables, tropical fruit, avocados, nursery products, cut flowers, and South American-specific issues
Samuel Rosa	202-720-9792	Fresh citrus, fruit juices, honey, tree nuts, and CBI-specific issues
Joe Somers	202-720-2974	Situation and outlook group leader, fresh and processed citrus, and FAO citrus liaison
Mark Thompson	202-720-6877	Circular editor, fresh and processed potatoes, dried fruit, trade forecasts, and cross-commodity issues

MARKETING

Laura Davis	202-720-2252	Apples, strawberries, blueberries, and fresh tomatoes
Ted Goldammer	202-720-8498	Wine, brandy, and almonds
Jean Harman	202-720-0897	Fresh and canned pears, canned peaches, fresh cherries, honey, hops, and potatoes
Stacey Peckins	202-690-1341	Nursery products, avocados, pistachios, papaya, and canned tomatoes
Elise Pinkow	202-690-1341	Table grapes, concord grapes, peaches, pears, plums, and cranberries
Steve Shnitzler	202-720-8495	Walnuts, kiwifruit, ginseng, asparagus, tart cherries, and processed corn
Robert B. Tisch	202-720-0898	Citrus, raisins, and prunes

For subscription questions or address changes, please contact Robertha McLean, 202-720-9445.

TABLE OF CONTENTS

PAGE

EXPORT NEWS AND OPPORTUNITIES:
- U.S. Fruit Exports to Costa Rica Continue to Grow 6
- FY 1994 GSM-102 Credit Guarantee Coverage 6

WORLD TRADE SITUATION AND POLICY UPDATES:
- Chinese Inspectors Visit Washington State Orchards and Packing Facilities 7
- ATAC Delegation Visits Chile to Discuss U.S. Fruit Access 7
- EU Changes Apple Reference Price System to Settle Dispute with Chile 7

FEATURE ARTICLES:
- India's Horticultural Industry and the Competition Outlook in World Markets 8
- Macadamia Situation for Selected Countries 15
- Canned Deciduous Fruit Situation for Selected Countries 21
- Strawberry Trade Situation in Selected Countries 39

STATISTICS:
- U.S. Horticultural Exports Summary 4
- U.S. Horticultural Imports Summary 5
- FY 1994 GSM-102 Credit Guarantee Coverage 7
- India: Exports of Apples 11
- India: Exports of Mango 12
- India: Exports of Table Grapes 12
- Macadamia: Production, Supply, and Distribution 20
- Italy: Exports of Canned Peaches 23
- Japan: Imports of Canned Peaches by Country of Origin 26
- United States: Canned Fruit Mixtures Exports 32
- United States: Canned Peach Exports 32
- United States: Canned Peach Imports 33
- United States: Canned Pear Exports 33
- U.S. Cling Peach Situation and Outlook 34
- Canned Peaches: Production, Supply, and Distribution 35
- Canned Pears: Production, Supply, and Distribution 36
- Canned Fruit Mixtures: Production, Supply, and Distribution 37
- Canned Apricots: Production, Supply, and Distribution 38
- United States: Imports and Exports of Strawberries 40
- Production, Supply, and Distribution of Strawberries for Selected Countries 45
- U.S. Exports of Horticultural Products by Destination 49
- U.S. Imports of Horticultural Products by Origin 52

Export Summary

U.S. horticultural exports rose again in February 1994, to $545 million, up just 1 percent over February 1993. Major increases in fresh deciduous fruit (up 39 percent) and miscellaneous products like beer and potato chips (up 21 percent) more than made up for declines in citrus (down 10 percent), juices (down 4 percent), fresh vegetables (down 16 percent), preserved vegetables (down 8 percent), and nursery products except cut flowers (down 16 percent). Total exports for fiscal year 1994-to-date (October-February) are $3.2 billion, up 8 percent over the same time period in FY 1993.

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds, 1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
FEB 94

NAME	QUANTITY					VALUE (1,000 DOLLARS)				
GROUP & COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR, FRUIT CITRUS MT										
GRAPEFRUIT	86,618	70,318	229,647	225,231	444,767	41,329	34,982	116,193	113,607	222,290
LEMONS	11,412	10,533	59,884	59,879	127,336	7,166	6,348	38,925	48,726	99,698
ORANGES, INCL TMPLS	53,195	50,783	184,356	176,229	562,596	25,603	25,341	90,374	96,870	279,503
OTHER CITRUS	3,491	3,703	13,534	13,821	19,313	2,661	2,711	11,829	11,721	16,507
Subtotal:----	154,718	135,338	487,423	475,161	1,154,014	76,760	69,383	257,322	270,925	618,001
FR, FRT, NON-CIT MT										
APPLES	38,148	52,564	262,745	321,213	487,808	21,871	33,009	162,611	198,143	297,141
AVOCADOS	733	405	1,559	2,401	14,185	763	416	1,843	2,388	14,223
CHERRIES SWT & TRT	22	15	222	162	25,747	46	37	492	334	111,252
GRAPES	1,155	1,248	71,046	91,551	184,774	1,676	1,487	81,695	104,287	215,189
KIWIFRUIT	1,401	1,548	3,513	4,930	8,359	2,134	2,245	5,013	7,127	12,071
MELONS	2,744	3,194	23,100	23,499	196,473	1,804	2,407	12,914	13,971	74,192
PAPAYA	554	544	3,129	3,091	7,596	1,041	1,064	5,805	5,910	14,151
PEACHES & NCTRNS	464	710	3,284	2,723	63,998	636	699	3,111	2,589	57,507
PEARS	7,316	9,703	55,273	69,477	98,815	4,733	5,186	33,318	38,448	60,258
PLUMS/PRUNES	262	314	5,253	3,138	56,959	387	345	4,533	2,795	52,120
STRAWBERRIES	1,076	1,743	6,422	8,300	45,415	2,250	3,307	16,993	20,665	77,412
OTHER NON-CITRUS	1,258	1,445	15,383	18,907	53,452	1,135	1,356	13,985	16,942	53,860
Subtotal:----	55,138	73,437	450,935	549,397	1,243,586	38,482	51,562	342,318	413,605	1,039,381
CND/PREP FRUIT MT										
CHERRIES TRT CND	625	250	3,194	1,947	7,322	892	417	5,329	3,440	12,632
FRUIT MIXTURES	2,132	2,005	16,322	11,198	35,007	2,588	2,547	17,557	13,364	39,597
MARACHINO CHRY	370	308	2,091	2,014	4,912	753	672	4,070	3,983	9,706
PEACHES CANNED	1,287	1,425	8,261	7,552	21,390	1,312	1,523	8,179	7,266	20,960
PINEAPPLE CANNED	362	278	2,079	1,801	4,295	346	249	1,928	1,619	3,931
FRT PREP/PRES	5,321	4,568	26,996	25,018	61,466	6,969	5,314	33,150	29,075	75,437
OTHER CANNED FR	2,992	2,463	11,694	11,958	32,246	2,492	2,150	11,818	11,068	30,629
Subtotal:----	13,092	11,301	70,641	61,489	166,641	15,354	12,875	82,034	69,819	192,895
DRIED FRUIT MT										
PRUNES, DRIED	7,289	4,239	40,338	26,761	84,752	10,136	10,391	60,589	60,536	137,529
RAISINS, DRIED	8,580	8,645	50,657	51,438	121,529	12,050	13,713	70,558	80,211	180,885
OTHER DRIED FRUIT	1,217	1,313	9,286	9,458	19,865	3,165	3,702	23,608	24,810	49,237
Subtotal:----	17,086	14,197	100,282	87,658	226,148	25,351	27,807	154,756	165,557	367,651
FROZEN FRUIT MT										
BLUEBERRIES, FZN	923	742	4,092	2,326	8,600	1,712	1,182	7,316	3,647	15,058
STRAWBERRIES, FZN	806	1,174	4,398	7,934	16,017	1,041	1,645	5,556	10,520	20,864
OTHER FZN FRUIT	930	537	6,709	4,259	16,231	1,034	840	9,430	6,900	23,726
Subtotal:----	2,660	2,455	15,201	14,520	40,849	3,789	3,668	22,303	21,068	59,649
FRT&VEG JUICE (SSE) KL										
GRAPEFRUIT JU CNC	4,124	2,326	17,966	8,634	60,686	2,713	2,458	11,511	7,620	36,980
ORANGE JU NT CNC	5,871	7,511	34,173	41,990	92,328	4,638	5,057	26,924	28,733	68,746
ORANGE JUICE CNC	26,594	14,158	109,816	80,529	349,883	11,058	9,564	45,446	50,404	140,737
OTHER JUICES	28,411	22,400	139,931	123,365	363,216	16,616	16,407	77,832	82,485	214,146
Subtotal:----	65,002	46,397	301,888	254,520	866,115	35,028	33,487	161,714	169,243	460,611
VEGETABLES FR MT										
ASPARAGUS, FR, CHLD	1,976	1,883	2,912	3,264	21,288	6,791	7,948	9,387	13,272	62,514
BROCCOLI	10,290	12,880	44,141	55,061	102,948	6,519	7,862	30,469	33,855	69,469
CAULIFLOWER	6,597	8,193	28,735	39,546	70,346	4,409	5,086	21,111	25,539	49,628
CELERY	9,323	10,291	50,890	53,287	115,257	6,734	2,714	24,198	17,499	51,058
LETTUCE, FR, CH.	27,516	23,786	142,489	139,323	315,002	15,419	9,527	67,539	54,617	154,873
ONIONS, FR	8,985	4,661	65,314	50,825	183,005	3,918	2,898	26,680	22,863	71,840
PEPPERS	4,058	3,301	28,366	20,790	60,961	2,705	2,433	18,245	17,704	48,485
TOMATOES, FR, CH.	10,274	9,305	68,813	55,804	167,332	7,284	6,168	61,419	51,334	133,834
OTHER VEG, FR.	34,534	34,167	183,420	188,804	638,995	22,714	21,081	128,019	130,495	355,598
Subtotal:----	113,557	108,470	615,085	606,709	1,675,138	76,496	65,721	387,071	367,182	997,304
VEGETABLES CANNED MT										
CATSUP & CHILI SA	2,141	2,632	9,388	10,352	23,641	1,776	2,014	7,686	8,930	18,526
SWEET CORN CANNED	10,708	12,173	71,477	72,283	176,881	8,064	9,439	53,236	57,032	132,161
TOMATO PASTE	6,179	4,523	28,930	32,478	73,238	5,252	3,690	22,877	26,952	59,815
TOMATO SAUCE	5,110	5,561	26,270	30,581	68,893	5,203	5,921	25,589	31,616	65,694
OTHER CANNED VEG.	17,626	14,722	89,871	85,197	229,781	21,444	17,474	111,082	106,637	278,154
Subtotal:----	41,766	39,613	225,938	230,893	572,436	41,741	38,541	220,472	231,169	554,351
FROZEN VEGETABLES MT										
FROZEN FRENCH FRY	16,580	18,775	83,319	96,820	211,387	11,633	13,851	59,029	69,075	149,434
FZN SWT CORN	3,997	4,035	26,761	27,121	62,107	3,330	3,564	21,947	23,895	50,528
OTHER POT. FZN	1,339	1,092	6,509	8,739	18,656	1,203	805	5,272	7,114	14,968
OTHER FZN VEG	4,206	3,905	22,657	22,148	60,509	3,753	3,571	21,106	20,716	57,313
Subtotal:----	26,124	27,809	139,248	154,829	352,660	19,920	21,792	107,356	120,801	272,244
DEHYD VEGETABLES MT										
GARLIC DEHY	747	571	2,835	3,106	7,478	1,626	1,442	6,759	7,556	18,182
ONIONS DEHY	1,701	2,041	8,995	10,925	23,183	3,934	4,876	20,961	24,642	53,986
POTATO DEHYD	1,788	3,746	12,766	16,770	34,315	2,104	3,884	12,021	17,391	35,043
OTHER DEHY VEG.	2,805	2,951	14,647	11,377	32,937	4,347	5,391	22,044	23,718	49,325
Subtotal:----	7,042	9,311	39,243	42,180	97,915	12,013	15,595	61,786	73,308	156,537
TREE NUTS MT										
ALMND SH/PREP	15,766	10,783	80,331	76,187	161,466	51,784	51,820	265,718	351,648	565,786
ALMONDS, UNSHLD	1,025	873	8,920	6,130	15,878	1,996	2,410	16,181	16,275	32,772
PISTACHIO, UNSHLD	1,207	732	6,935	4,433	12,840	3,917	1,834	23,750	12,695	42,591
WALNUTS, SHLD	905	945	11,807	12,348	16,909	3,769	4,284	37,512	41,508	58,735
WALNUTS, UNSHLD	201	883	28,753	38,619	33,152	534	1,639	58,189	74,093	67,492
OTHER NUTS	3,344	3,770	27,462	30,894	57,568	10,811	12,230	79,105	90,268	168,454
Subtotal:----	22,450	17,989	164,211	168,614	297,816	72,814	74,221	480,458	586,490	935,834
NURSERY PRODUCTS NONE										
CUT FLOWERS	0	0	0	0	0	3,503	3,276	14,731	15,523	38,122
OTHER NURSERY	0	0	0	0	0	15,393	12,883	65,237	59,387	172,239
Subtotal:----	0	0	0	0	0	18,897	16,159	79,968	74,910	210,362
HOPS & PRODUCTS MT										
HOP EXTRACT	468	717	2,498	2,812	4,027	7,640	7,162	42,147	35,245	66,837
HOP PELLETS	359	530	2,582	1,721	5,116	1,724	2,418	15,637	9,651	30,931
HOPS, NSFP	471	205	1,936	1,113	2,521	2,602	1,355	11,730	6,585	15,507
Subtotal:----	1,300	1,453	7,017	5,646	11,665	11,967	10,936	69,515	51,482	113,275
WINE KL										
GRAPE WINES	8,699	7,004	44,319	41,692	117,688	11,693	10,686	62,672	62,941	165,337
OTHER WINE PRODUCTS	930	393	7,310	5,214	14,839	393	753	3,297	4,431	11,242
Subtotal:----	9,630	7,397	51,630	46,907	132,527	12,086	11,439	65,970	67,373	176,580
MISCELLANEOUS KL										
BEER & BEVERAGES	22,521	27,575	139,570	143,205	414,388	14,432	17,964	88,359	86,976	259,492
EDIBLE PREPARATIONS	9,634	11,519	47,744	58,652	124,809	29,845	43,559	156,371	207,932	450,622
GINSENG	39	50	711	611	894	5,818	4,350	84,482	56,309	104,376
POTATO CHIPS	3,049	3,864	17,789	22,935	47,774	8,728	10,212	45,903	62,790	118,430
OTHER MISC.	0	0	0	0	0	19,867	16,447	84,518	91,219	211,147
Subtotal:----	35,245	43,009	205,815	225,406	587,867	78,693	92,534	459,636	505,228	1,144,069
Grand Total:						539,398	545,727	2,952,686	3,188,168	7,298,750

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
FEB 94

NAME		QUANTITY					VALUE (1,000 DOLLARS)				
GROUP & COMMODITY		CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT	MT										
APPLES		4,481	3,073	26,256	17,475	119,770	1,491	1,617	8,584	8,331	70,726
AVOCADO		139	197	16,364	6,588	18,470	115	160	11,697	3,996	12,899
BANANA		272,497	252,347	1,438,824	1,403,592	3,536,585	78,665	65,820	398,911	374,616	1,004,787
CANTELOUPE		26,609	27,208	94,319	91,798	213,007	8,834	7,803	29,751	27,658	67,635
GRAPE		77,461	65,176	148,971	135,059	325,134	54,930	47,531	113,036	106,167	261,626
KIWIFRUIT		267	187	1,264	1,538	24,791	299	106	1,469	1,402	16,602
MANGO		1,066	1,532	6,236	6,419	110,290	1,129	1,507	6,452	7,777	84,344
PEACH		12,295	12,655	33,999	38,293	41,376	7,857	8,464	21,547	24,642	26,410
PEAR		18,526	18,138	21,273	20,859	64,825	7,036	7,074	11,647	11,768	32,038
PINEAPPLE		10,357	8,398	46,683	44,729	124,177	3,585	2,941	17,310	15,898	46,139
STRAWBERRY		1,075	1,556	4,619	5,217	14,470	1,945	3,900	8,989	12,011	22,158
OTHER MELON		13,490	13,852	50,919	54,104	114,510	4,875	5,071	18,774	19,973	41,350
OTHER FRUIT		46,620	41,957	215,105	205,071	512,714	19,902	19,594	96,940	99,150	205,691
Subtotal:----		484,888	446,284	2,104,836	2,030,748	5,220,125	190,667	171,595	745,113	713,394	1,892,412
DRIED FRUIT	MT										
DRD APRICOT		548	929	5,639	4,746	11,053	1,214	2,570	13,156	12,203	25,135
DRD FIG & PASTE		1,427	1,267	5,253	5,608	8,786	1,665	1,349	7,703	7,303	10,808
OTHER DRD FRUIT		1,508	1,683	14,055	11,211	29,643	1,968	2,455	14,904	16,502	36,546
Subtotal:----		3,484	3,881	24,948	21,567	49,483	4,848	6,375	35,765	36,008	72,490
FROZEN FRUIT	MT										
FZN BLUEBERRIES		346	1,086	1,871	2,901	5,677	694	1,434	3,717	4,058	9,926
FZN STR		2,226	1,319	4,943	3,158	19,937	2,614	1,414	6,339	3,952	21,271
OTHER FZN FRUIT		2,504	3,181	9,375	12,795	32,037	2,923	3,707	10,356	13,720	34,039
Subtotal:----		5,077	5,587	16,190	18,854	57,651	6,232	6,557	20,414	21,731	65,236
CANNED/PREP FRUIT	MT										
CANNED OLIVES		3,088	3,684	32,655	29,002	74,492	6,949	8,170	67,661	60,404	153,316
CANNED ORANGES		2,815	4,125	13,512	16,370	41,806	2,668	3,184	13,364	13,191	39,502
CANNED PEACH		1,084	887	15,307	11,762	23,011	675	520	10,724	6,479	15,375
CANNED PINEAPPLE		25,952	29,728	132,352	135,357	344,866	16,691	16,131	83,741	76,480	212,896
MIXED FRUIT		2,896	3,297	15,412	20,324	33,405	2,517	2,575	13,763	17,090	29,875
PREP/PRES FRUIT		3,281	3,958	21,668	23,028	58,233	4,461	4,882	24,975	26,017	66,860
OTHER CANNED FRUIT		2,556	3,848	16,407	22,354	47,278	3,657	5,332	23,032	29,549	60,772
Subtotal:----		41,674	49,531	247,316	258,198	623,093	37,620	40,797	237,263	229,213	578,600
FRT&VEG JUICE (SSE)	KL										
APPLEPEAR JU		41,087	51,347	331,278	375,261	946,807	13,364	9,584	104,330	74,275	243,682
FCOJ		78,470	124,367	506,958	736,464	1,122,350	12,776	24,053	89,897	144,677	191,591
GRAPE JU		6,951	2,420	59,521	25,774	148,404	2,744	1,296	22,125	9,019	52,117
PINAP JU		29,000	28,913	134,684	133,494	339,270	6,418	6,066	32,419	29,914	77,767
OTHER FRUIT JU		11,932	12,912	50,302	68,642	149,384	5,220	7,835	27,431	38,799	77,630
Subtotal:----		167,441	219,962	1,082,745	1,339,637	2,706,217	40,524	48,837	276,205	296,686	642,789
FRESH VEGETABLES	MT										
GARLIC		1,440	2,620	3,086	15,214	29,171	1,869	2,400	3,440	9,016	23,144
ASPARAGUS		7,672	3,807	16,697	13,843	29,852	11,947	6,724	23,977	21,218	39,213
BELL PEPPER		21,338	21,389	68,463	66,185	121,859	14,070	19,782	58,571	69,077	129,247
CARROTS		4,478	4,305	33,568	37,223	51,431	1,440	969	8,819	8,617	14,066
CHILI PEPPER		4,004	4,709	16,317	16,017	36,933	5,411	4,983	23,110	19,938	48,709
CUCUMBER		47,247	51,695	164,820	160,318	238,841	14,038	22,173	52,669	71,582	85,192
ONIONS		25,594	36,700	73,000	101,105	218,400	10,537	22,419	44,417	62,507	104,818
POTATO, INCL SD		32,613	35,523	124,245	147,248	302,186	4,721	8,128	18,536	32,130	49,596
SQUASH		16,063	16,101	57,927	61,965	95,290	18,798	9,413	50,688	34,963	87,590
TOMATOES		70,942	62,922	155,413	176,576	380,911	53,498	89,630	135,851	189,520	307,454
OTHER FRESH VEGETAB		33,174	29,681	128,847	123,764	285,285	17,718	19,225	75,389	77,438	156,317
Subtotal:----		264,571	269,456	842,387	919,464	1,790,165	154,052	205,851	495,470	596,009	1,045,351
CANNED/DEHYD VEGET	MT										
CND ARTICHOKE		1,086	1,610	5,139	4,527	20,456	1,650	2,562	8,269	7,246	32,256
CANNED BAMBOO		1,829	1,936	14,094	14,780	28,680	1,559	1,680	12,194	11,578	24,939
CND MSHROOMS		3,495	5,358	21,814	19,546	47,213	7,435	9,376	47,805	39,153	100,977
CND PIMIENTO		337	527	2,637	3,051	6,172	412	550	4,394	3,559	8,532
CND TOM		2,442	1,728	20,193	15,291	45,500	902	651	7,430	5,310	17,799
CANNED WATERCHESTNU		1,602	2,745	12,473	9,672	39,558	1,234	1,945	8,644	7,290	27,926
TOMATO PASTE & SAUC		750	1,298	8,528	7,606	40,209	499	1,140	5,049	4,954	27,282
DRIED MUSHROOMS		143	130	653	602	1,817	1,919	1,457	9,529	7,342	22,462
DRIED TOMATOES		316	271	2,789	3,028	6,491	1,296	999	11,369	11,129	25,842
OTHER DEHYD VEGETAB		5,845	4,432	31,040	35,417	89,437	4,422	3,565	24,082	22,566	61,180
OTHER CND VEG		15,635	17,435	85,145	87,483	197,571	15,551	18,129	86,365	92,587	208,971
Subtotal:----		33,486	37,474	204,511	201,007	523,108	36,885	42,057	225,135	212,717	558,172
FROZEN VEGETABLES	MT										
BROCCOLI FZN		16,714	14,070	81,550	53,086	170,431	11,041	9,901	54,150	36,793	113,224
CAULIFLOWER FZN		1,328	3,806	17,276	23,710	22,290	998	2,997	12,283	20,507	15,842
POTATO FZN		9,704	10,611	45,434	52,581	125,895	5,557	6,110	25,354	29,331	69,284
OTHER VEG FZN		68,918	218,890	460,269	688,857	1,671,650	6,624	9,090	37,408	40,719	88,516
Subtotal:----		96,666	247,377	604,530	818,236	1,990,268	24,221	28,099	129,197	127,351	286,869
TREE NUTS	MT										
BRAZILS TOT		425	260	3,321	2,942	10,429	580	504	4,887	6,325	15,171
CASHEWS TOT		4,661	4,783	30,913	26,655	64,377	19,542	20,924	124,031	111,424	260,328
COCONUT		4,166	4,109	25,509	28,869	59,768	3,511	3,385	21,439	23,177	49,330
PECANS		871	2,168	14,903	6,512	20,305	5,203	3,668	54,320	15,889	88,874
OTHER NUTS		741	714	9,537	9,862	21,106	2,912	2,554	31,191	33,610	73,209
Subtotal:----		10,866	12,036	84,186	74,842	175,987	31,751	31,037	235,871	190,428	486,914
NURSERY PRODUCTS	M										
CARNATIONS		85,564	82,043	423,711	455,171	920,969	7,542	7,188	36,949	38,424	82,772
CHRISTMAS TREES		0	38	1,988	2,024	1,995	0	24	17,254	17,066	17,286
CHRYSANTHEMUMS		10,020	46,643	59,749	215,226	159,073	4,695	4,300	26,275	29,398	66,054
ROSES		100,863	100,218	269,962	303,700	584,669	20,118	21,379	48,636	55,414	102,915
TULIP BULBS		0	0	65,749	64,784	284,022	0	0	7,859	7,804	32,959
OTHER CUT FLRS		0	0	0	0	0	10,944	12,551	44,510	50,281	106,414
OTH NURS PROD		0	0	0	0	0	18,596	17,922	97,180	97,837	215,556
Subtotal:----		196,448	228,943	821,161	1,040,907	1,950,730	61,897	63,367	278,667	296,227	623,959
HOPS & PRODUCTS	MT										
HOPS & PELLETS		740	1,329	2,598	4,037	3,982	4,589	8,751	12,634	25,706	22,237
OTHER HOP PRODS		4	216	5	464	134	59	1,180	67	2,743	933
Subtotal:----		745	1,546	2,604	4,502	4,116	4,648	9,932	12,701	28,450	23,171
WINE	KL										
RED WINE		6,818	6,557	38,237	44,769	98,370	22,634	20,799	142,602	155,575	379,584
SPARKLING WINE		1,040	1,050	15,670	17,050	29,680	9,990	10,617	123,542	140,634	251,670
WHITE WINE		4,495	5,898	39,619	40,561	92,358	12,402	17,200	126,849	120,307	279,901
OTHER WN PROD		1,245	1,652	8,634	11,010	23,752	2,986	4,061	22,001	29,762	60,012
Subtotal:----		13,599	15,159	102,161	113,391	244,162	48,013	52,679	414,997	446,280	971,169
MISCELLANEOUS	KL										
BEER & BEVERAGES		80,648	84,282	395,322	456,732	1,119,446	66,505	68,056	335,064	373,105	952,084
OTHER MISC.		0	0	0	0	0	55,821	52,519	289,099	308,548	720,413
Subtotal:----		80,648	84,282	395,322	456,732	1,119,446	122,326	120,575	624,163	681,653	1,672,498
Grand Total:							763,690	827,763	3,730,967	3,876,153	8,919,637

U.S. Fruit Exports to Costa Rica Continue to Grow.

During calendar 1993, U.S. exports of fresh fruit to Costa Rica jumped 46 percent from 1992 to a record value of $6.6 million, including $3.3 million in apples and $2.7 million in grapes. Total fruit exports were only $1.2 million in 1988 and $4.5 million in 1992. The export growth is the result of reduced tariffs (cut in half to 19 percent ad valorem), strong economic growth, and promotion activities. The United States also has a price advantage over major competitors, such as Chile, because of lower transportation costs. The cost of shipping a container of U.S. grapes to the Port of Caldera, Puntarenas, is $2,700, while shipping a container of Chilean grapes costs $4,700.

Imports are made by 4 major Costa Rican wholesalers, who import the majority of fresh fruit from October through December. However, promotion efforts by U.S. fruit growers associations assisted by Market Promotion Program funds have helped extend the import season (e.g., U.S. apples are now available year-round).

GSM-102 applications for hops to Mexico continue to rise.

Since last month's report, U.S. hops exporters have applied for $200,000 of coverage under the GSM-102 credit guarantee program. The additional registrations boosts the total amount of coverage to $2.8 million this year. Apart from this, there was no other horticultural activity under the program during the reporting period.

FY 1994 GSM-102 Credit Guarantee Coverage 1/

Country/ Commodity	Announced Allocations FY 1994 ($1,000)	Exporter Applications Approved ($1,000)	Balance ($1,000)
Colombia			
Fresh fruits 2/	500	0	500
Tree nuts	500	0	500
Indonesia			
Potatoes 3/	2,000	0	2,000
Mexico			
Almonds	1,000	0	1,000
Fresh fruits 2/	1,000	0	1,000
Hops	6,500	2,800	3,700
Tunisia			
Almonds/Walnuts	500	0	500
Raisins	500	0	500
Turkey			
Potatoes 3/	5,000	0	5,000
Venezuela			
Fresh Fruits 4/	2,000	0	2,000

1/ Coverage through April 08, 1994.
2/ Apples, pears, plums, peaches, nectarines, and strawberries.
3/ Cut for french fries.
4/ Apples, pears, plums, grapes, cherries, and peaches.

World Trade Situation and Policy Updates

Chinese Inspectors Visit Washington State Orchards and Packing Facilities.

As part of the phytosanitary agreement signed with China on December 18, 1993 to permit imports of Washington State apples, two Chinese inspectors visited fruit packing facilitates and orchards from April 14 - 25. Once the list of growers and packers is approved by officials from China's Animal and Plant Quarantine Administration, shipments of Washington State apples could conceivably begin immediately. Although trade sources estimate that approximately 12,000 metric tons of U.S. apples are sold annually in China's markets, the phytosanitary import ban has limited imports of U.S. apples to shipments arriving unofficially via Hong Kong. In addition to the progress being made in the phytosanitary area, China also lowered the tariff on imported apples from 80 percent to 40 percent effective January 1, 1994. The tariff reduction should allow imported apples to be more affordable to a larger number of consumers, and more competitive with China's domestically produced apples.

ATAC Delegation Cites Favorable U.S. Fruit Access in Chile.

A delegation representing the Fruit and Vegetable Agricultural Technical Advisory Committee (ATAC) and FAS focused prominent attention on Chile's phytosanitary-based import ban on U.S. fruit during its March 21-24 visit to that country. The visit, which included meetings with senior-level Chilean Government officials and industry representatives, served to raise the profile of these technical issues and elicited pledges of cooperation from the Chilean side. During the ATAC delegation visit, key Chilean officials were optimistic that import barriers to U.S. grapes, citrus, and berries could be resolved. The annual meeting between the two countries' technical experts is planned for June in Santiago.

EU Changes Apple Reference Price System to Settle Dispute with Chile.

The EU Commission recently announced that it had reached a settlement with Chile regarding that country's GATT panel complaint about the EU reference price system for apples. Chile agreed to suspend its complaint in exchange for changes in the operation of the reference price system. The Commission agreed to reduce tariffs on apples by 50 percent (rather than 36 percent) in the Uruguay Round, to use a weighted average import price rather than an arithmetic mean average import price to trigger the countervailing charge on apple imports below the reference price, and to allow the countervailing duty to be lifted in 4 days rather than the current 6 days. Apple industry sources are uncertain whether the change in import price calculation will have a measurable impact on U.S. exports.

INDIA'S HORTICULTURAL INDUSTRY AND THE COMPETITION OUTLOOK IN WORLD MARKETS

[Note: This is the second competition article in a series. Australia was featured in the April issue.]

India's export prospects appear bright since it embarked upon a course of major economic reforms over the past few years. Some measure of trade liberalization has occurred, and more is expected as reform packages have become annual events. The successful conclusion of the Uruguay Round has reportedly bolstered confidence in trading opportunities with India, both as a market and as a supplier of a variety of horticultural products and commodities to world markets. Apart form the long-established trade in tropical products (e.g., spices, mangoes, tropical fruit and vegetables), India is targeting markets with crops normally associated with temperate climate suppliers: table grapes, apples, and fresh and processed vegetables. Although starting from a very low base, India is now exporting products to non-traditional markets. As India's ability to penetrate these markets is improved through further economic reforms, there is some question as to the extent India will assert itself as a competitor of the United States in horticultural products.

Overview of India's Horticultural Industry

This report focuses on export prospects for three fruits: table grapes, apples, and mangoes.

India's diverse agroclimatic endowment enables the country to grow an enormous variety of horticultural crops, including fruits, vegetables, flowers, spices, cashews, cocoa, and root crops.

India is one of the largest producers of horticultural products, with official estimates of 32 million tons harvested on about 3.32 million hectares. Yet, according to GOI estimates, India's share of world trade in both fresh and processed product is less than one percent. Moreover, there is considerable post-harvest loss (30-40 percent) in the marketing chain and average yields are comparatively low by world standards.

The following table presents planted area and production data for selected fruit. India is a major producer of a wide range of fruits, including apples, grapes, mangoes, and bananas, virtually all of which are retained for the domestic market.

INDIA: Selected Horticultural Production (Hectares; Metric Tons 1/)

Commodity	Area	Production
Apples	194,561	1,147,743
Bananas	383,938	7,790,030
Citrus	386,929	2,821,880
Oranges	143,475	938,192
Guavas	93,977	1,095,309
Grapes	32,365	668,243
Mangoes	1,077,621	8,752,134
Pineapple	57,059	768,513

Source: GOI official data for 1991/92

GOVERNMENT ASSISTANCE

Although the horticultural sector offers tremendous potential for economic improvement, the Government of India (GOI) has only recently turned its attention toward the sector. The GOI clearly acknowledged horticulture's importance by provisionally allocating Rs 10 billion (about

$325 million) to the sector in the VIII Plan, India's national development framework for 1992-1997. This is over 40 times the budget allocated for horticulture in Plan VII (1987-1992). Several priority programs were identified: working groups on crop improvement, infrastructural development for post-harvest handling, and export enhancement. Some of these programs have already begun to be implemented.

Most of the development projects are carried out by state governments. However, the private sector is also involved in Plan VIII. This approach is a departure for India, and marks the first time the private sector has been asked by the GOI to participate.

The GOI's integrated approach to horticultural development has many components. The National Horticultural Board (NHB), set up in 1984, is charged with the responsibility of developing the sector. For example, the NHB works to improve facilities for grading/packing, transportation, storage, marketing, and processing. Special emphasis is on the post-harvest infrastructure and on developing an integrated marketing network. Under Plan VIII (1992-1997), the NHB's objectives include: 1) increasing private investment in horticultural businesses; 2) improving the flow of products to targeted domestic and export markets and achieving competitive standards; and, 3) promoting exports of value-added products. In order to meet these objectives, the NHB is offering a soft loan scheme at interest rates of five percent payable over five years. According to the GOI plan, priority is given to projects with an export orientation. Loans are available for up to 40 percent of the proposed activity, or a limit of Rs 10 million (about $325,000).

Export Promotion

India's push to develop export potential is further assisted by the Agricultural & Processed Food Products Export Development Authority (APEDA), a branch of the Ministry of Commerce. APEDA has an important new role in promoting horticultural products and is armed with a budget of $2.5 million for export promotion for the current year. Some of the program's elements are similar to the USDA's Market Promotion Program (MPP), but its budget is much smaller. A significant portion of the funds will be directed at table grape exports by providing matching promotional funds for European United (EU) countries. Part of the strategy calls for generic in-store promotions at retail outlets in the United Kingdom. APEDA also offers an airfreight subsidy of Rs 10/kilogram ($0.32/kg) on shipments after March 31 and before January 1. The cap on this offer is Rs 100,000 per exporter; airfreight as of February 1994 was estimated at approximately Rs 60/kilogram. APEDA provides limited financial assistance to defray equipment and other costs, including pre-cooling chambers, storage facilities, and packaging materials. Furthermore, APEDA plans to finance the construction of cold storage facilities at key airports. The long term goal identifies dedicated terminals for horticultural product exports located in Bombay and New Delhi. However, such large-scale projects will be financed by the private sector.

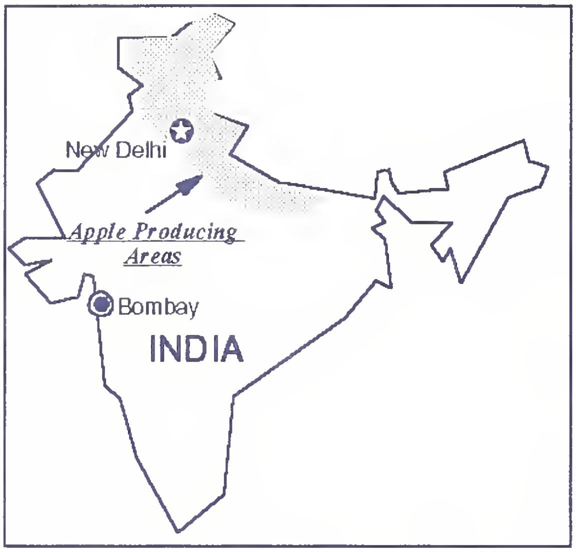
Market Development

One of the major activities to be undertaken this year is a market development tour of EU countries. This effort will build on the seminal work of a few entrepreneurs who have carved a niche for Thompson seedless grapes in the United Kingdom. According to APEDA officials, private participants are expected to contribute 50 percent of estimated costs. Later this year, several private grape grower/exporters plan to attend a course in post-harvest loss reduction for table grapes at the University of California/Davis, a program organized in part by APEDA. Last year, a few of the leading table grape exporters participated in the Produce Marketing Association's (PMA) annual meeting in Washington, D.C. In short, there is a concerted effort to lay the foundation for development of horticultural export markets, of which table grapes is but one commodity.

EXPORT VS. DOMESTIC MARKET

There has been much discussion about India's potential in the export market. However, there is also a segment of the domestic market that commands attention. Estimates abound of India's middle class, depending on the source. It is estimated variously from about 50 million (about five percent of population) up to 150 million. Generally, India's middle class has a

relatively low level of disposable income. However, this segment demands a diverse diet comprised of many of the same products India has targeted for development as horticultural exports. One constraint is that the infrastructure for marketing high-quality fresh fruit is decidedly limited in the major population centers. For example, there are reportedly only a few retail cold storage facilities in New Delhi, the nation's capital of about 10 million.



The majority of foreign investment in horticultural crops in India is focused on processing for sale on the local market. Conversely, there has been very little interest thus far in investment for production. The focus on processing will undoubtedly form the basis for future exports. For example, an early entrant is Pepsico, an American food group, which operates a large export-oriented tomato products cannery in Punjab. Although starting from a low base, India is beginning to build export capabilities in both fresh and processed fruit and vegetables. Continued efforts to liberalize trade and deregulate the economy will serve to make India attractive to investors and develop its export potential.

Terminal Market for Fresh Fruit & Vegetables

Distribution channels for fruits are extend from far-reaching production centers to markets. The Adzapur Fruit and Vegetable Auction, located on the outskirts of New Delhi, is one the largest markets in India. An estimated 500-700 trucks of apples were arriving from the northern states of Himachal Pradesh, and Jammu & Kashmir each day at the start of February 1994. Only about three trucks of grapes from Maharastra state were arriving as the season had just begun. Transportation costs were estimated at Rs 10,000 per 8-ton truck, including a 20 percent bonus for drivers.

The auction is an open market with no forward selling. Wholesalers, retailers, and individual consumers flock to Adzapur. There is also considerable private cold storage available just outside the market.

Fresh produce streams in to Adzapur all year long from virtually all producing areas in the country. For example, the overlapping seasons for apples from the northern states and the availability of cold storage extends the season from July through March. Grapes from the south appear in January and continue through April or May.

The GOI selected fruit as potential export commodities, in part because of widespread local production. Currently, India does not have a very diversified export trade in either apples or grapes, but has shipped both for several years to regional markets. However, India's trade in mangoes is quite sophisticated, with product leaving via airfreight shipments and refrigerated containers. The following tables show the range of India's export markets in 1990/91 and 1991/92. Current policy seeks to expand shipments and build a more diversified base of export markets.

Fruit Quality is Variable

A brief visit to Adzapur market in February revealed that apples and grapes are at different stages of development in terms of quality necessary to penetrate world markets. Whereas table grapes appeared to be graded and were attractively presented in four-kilogram boxes (marked "export quality"), apples were not. In fact, most of the apples on the market evidenced some fruit scab, reportedly due to a lack of interest in applying pesticides in strife-worn Kashmir, where about a third of India's apples are grown.

APPLES POSE POTENTIAL EXPORT COMPETITION

The table below shows that almost all of India's considerable apple crop is produced in the northern half of the country. These apple-producing states enjoy a temperate climate in part due to the altitude of the mountain ranges that rise from the Gangetic plains. India's production of apples for 1991/92 was estimated at about 1.15 million tons, almost all of which was bound for the domestic market.

INDIA: Apple Area and Production (Hectares; Metric Tons 1/)

State	Area	Production
Arunchal Pradesh	5,122	9,330
Himachal Pradesh	66,767	301,730
Jammu & Kashmir	69,457	624,469
Uttar Pradesh	53,000	212,000
Others 2/	214	214
TOTAL	194,560	1,147,743

Source: GOI official data.
1/ Data is for 1991/92 Indian fiscal year, April/March.
2/ Others includes Nagaland and Sikkim.

Prices at Adzapur for both Red and Golden Delicious apples for an 18 kilogram box on February 1, 1994, were Rs 230-290 ($1.00=Rs 32), depending on size.

The following table shows that India is an exporter of modest quantities of apples to regional neighbors. Most of this trade is organized by expatriate Indians in these markets. The GOI hopes to improve the quality and export infrastructure so that the range of markets can be expanded to include countries that demand higher value fruit. If successful, India could emerge as an exporter of some significance. According to official GOI data, there are already small shipments of Indian apples to Canada and Switzerland.

INDIA: Exports of Apples 1/ (1990/91-1991/92; Metric Tons)

Market	1990/91	1991/92
Bangladesh	2,976	10,351
Nepal	32	75
Singapore	5	0
Saudi Arabia	3	3
Other 2/	61	26
TOTAL	3,077	10,455

Source: GOI data.
1/ Exports are on an India fiscal year, April/March.
2/ Others includes Maldives and United Kingdom.
Note: trade with Sri Lanka is not listed in official data.

MANGOES: A RELIABLE EXPORT ITEM

India is also a major producer of mangoes, a fruit highly prized on the domestic market. Fresh mangoes are available throughout the year due to cultivation in virtually every state in the country. Mango production in 1991/92 was estimated at 8.75 million tons on about 1.0 million hectares.

INDIA: Mango Area and Production (Hectares; Metric Tons 1/)

State	Area	Production
Andhra Pradesh	207,596	2,491,152
Karnataka	80,803	677,712
Kerala	75,480	241,054
Maharastra	49,873	280,983
Madhya Pradesh	20,660	186,000
Uttar Pradesh	259,767	1,787,757
Tamil Nadu	55,824	336,351
Others 2/	327,404	2,751,125
TOTAL	1,077,621	8,752,134

Source: GOI official data.
1/ Data is for 1991/92 Indian fiscal year, April/March.
2/ Others includes 28 other states.

India is an exporter of fresh mango, with major markets in the Gulf region and in Europe (see table below). The volume of Indian mango is expected to build in coming years under the current policy to encourage trade. Singapore is a market which has reportedly begun to grow for Indian mangoes and other horticultural products. Recently, a new-to-market Indian mango, the Golapkha, was introduced in Singapore. India's competitive position in export markets should

increase as quality and infrastructural elements are improved.

INDIA: Exports of Mango 1/
(1990/91-1991/92; Metric Tons)

Market	1990/91	1991/92
UAE	9,581	12,593
Saudi Arabia	5,798	5,396
Bahrain	984	1,783
Kuwait	1,056	587
Bangladesh	94	1,000
Singapore	34	65
United States	36	71
United Kingdom	793	571
Netherlands	70	17
Germany	46	99
France	77	12
Canada	40	34
Others 2/	710	851
TOTAL	19,380	23,105

Source: GOI data
1/ Exports are on an India fiscal year, April/March.
2/ Others includes Hong Kong, Australia, and Belgium.

INDIA EMERGES AS TABLE GRAPE EXPORTER TO EUROPE

India has recently entered the export market with high-quality Thompson seedless grapes for the UK and other EU countries. Although the volumes are currently small, the potential for development of the export grape industry is enormous. Industry sources estimate exports to have reached 7,000 to 8,000 tons during the current season (February-April 1994), up from about 1,000 tons of trial table grape shipments in 1993. Speculation on prospects for 1995 suggests that exports of 20,000 tons of table grapes to the EU are not unreasonable. However, there are many potential bottlenecks in the system from field to packing shed to export terminal. Although strides have been made, India will need to strengthen its distribution system in order to expand export volume.

The high plains area of Nasik and Pune districts in Maharastra state, northwest of Bombay, is the center of India's fledgling export grape industry. India's emergence as an exporter is assisted by: 1) government economic reforms; 2) a small GOI market promotion fund ($2.5 million); 3) a modern container port; and, 4) access to upscale niche markets in Europe.

Competitive Angle

At its present state of development, India's export grape industry is not a threat to U.S. shipments of Thompson seedless to the lucrative UK market. In fact, it is complementary and probably helps to stimulate demand during the months prior to early-season shipments of U.S. grapes. However, exports from India during February-March will likely displace some grape shipments from Southern Hemisphere suppliers such as Chile or Australia. Moreover, efforts to extend the Indian export season could add downward pressure on prices of early-season U.S. grapes in the UK market. Thus, the enormous potential of India as a grape exporter creates some concern for the U.S. table grape industry.

INDIA: Exports of Table Grapes 1/
(Calendar Years, 1991-1995; Metric Tons)

Market	1991	1992	1993 2/	1994 3/	1995 3/
UAE	3,780	6,781	n/a	n/a	n/a
Saudi Arabia	336	1,885	n/a	n/a	n/a
Bahrain	221	563	n/a	n/a	n/a
Oman	43	102	n/a	n/a	n/a
Kuwait	42	229	n/a	n/a	n/a
Bangladesh	775	1,197	n/a	n/a	n/a
Others	153	343	n/a	n/a	n/a
Region 4/	5,350	11,100	12,500	12,500	15,000
Singapore	16	1	n/a	n/a	n/a
Hong Kong	3	1	n/a	n/a	n/a
EU 5/	0	0	1,000	8,000	15,000
TOTAL	5,350	11,100	13,500	20,500	30,000

Source: GOI data for 1991 and 1992; discussions with exporters for subsequent years.
1/ Exports are primarily Thompson Seedless variety.
2/ Estimated.
3/ Forecast.
4/ Region includes Gulf and Bangladesh.
5/ For 1993, exports to UK; for 1994 and 1995, assumes additional EU markets.
Note: Sri Lanka not included in GOI data.

India has exported grapes from Maharastra to neighboring Sri Lanka and the Gulf states (e.g., Bahrain, UAE, and Saudi Arabia) for decades. Most of this trade is in non-refrigerated bulk shipments and organized among the expatriate Indian communities in these countries. In the past, this traditional trade did not require high standards. In contrast, the new export grape industry incorporates modern viticultural and

packing technology, and is plugged into electronic market information. It is in the process of improving the export infrastructure and establishing a reputation for quality and high standards.

The 1994 season is pivotal to this export effort. Buyers have been coming to Maharastra from the UK to supervise operations from harvesting and packing straight through to the stuffing of containers bound for retail outlets such as Marks & Spencer and J. Sainsbury. In addition to the UK, Germany, and the Netherlands, Indian grape exporters hope to target Southeast Asian markets. Trial shipments are reportedly planned for Singapore this year.

The GOI's National Agricultural Cooperative Marketing Federation (NAFED) also exports grapes. NAFED typically buys direct from farmers and offers attractive export packaging and proper post-harvest fruit handling. Typical is a five kilogram pack of six to seven plastic pouches containing one or two grape bunches.

Entrepreneurial Spirit and the Rush to Exports

There has been a rush of entrants to India's export grape industry. In the Nasik area there are six packing plants and cold storage facilities under construction, with several others in planning stages. Nasik also supports over 50 mobile and stationary pre-cooling facilities for various fruits and vegetables. Some industry sources have expressed concern that the business is overheating. They suggest that half the estimated 40 exporters currently operating in Maharastra will leave after this season. Most large-scale operators have located packing houses adjacent to vineyards. Some exporters are vertically integrated back to the vineyards, although contract growing is also very popular. This is in part due to reportedly cumbersome land tenure laws in Maharastra that limit the size of holdings.

Exporters interviewed in Nasik district were eager to target the market niche for environmentally sound table grapes. Pesticide use in the vineyards is strictly controlled and in conformance with international standards. Water is monitored and analyzed for E. coli bacteria. In the packing sheds, biodegradable bags are used. APEDA is helping exporters meet these high standards by offering training programs.

A reported drawback to exporting table grapes to the United Kingdom is the terms of sale. Almost all shipments are on consignment basis. The consignee usually opens a Letter of Credit in the amount of a minimum guaranteed price. This method is difficult for exporters primarily due to interest charges, as payment is made several weeks after the container leaves Bombay's new port. Financing is difficult to obtain from banks because terms are consignment basis.

Another recent development is the Grape Exporters Association. This group is working with APEDA to establish acceptable business practices and standards as a means of ensuring export quality. Currently India's export grape industry is relatively unknown in EU markets, and this is one approach to creating a solid reputation.

Grape Production in India

Estimates of India's grape production vary widely. Production in Maharastra in 1991/92 is estimated by the GOI at 341,000 tons from a harvested area of about 17,000 hectares. Harvesting begins in February and ends in May, with the peak occurring March through April.

The following table shows the dominant position of Maharastra state in total grape production. Industry sources note that grapes have been produced in Maharastra for over a century. The climate and soils are reportedly ideal for a high quality grape product. Ambient temperature at harvest is 30-35 degrees celsius. Karnataka state, in the southern part of the country, and northern Punjab are also leading table grape producers. According to some Indian grape exporters, the Thompson Seedless variety in Punjab is often golden in color, small in size, and has a sour taste (low brix, 16-17 degrees), characteristics that reduce export potential for markets such as the United Kingdom.

INDIA: Grape Area and Production (Hectares; Metric Tons 1/)

State	Area	Production
Maharastra	17,118	341,539
Andhra Pradesh	2,252	56,300
Karnataka	6,490	141,670
Haryana	1,129	19,840
Punjab	2,238	60,426
Uttar Pradesh	600	750
Tamil Nadu	2,267	46,770
Jammu& Kashmir	186	348
Others 2/	85	600
TOTAL	32,365	668,243

Source: GOI official data
1/ Data is for 1991/92 Indian fiscal year, April/March.
2/ Others includes limited amounts in a few other states.

According to local Nasik growers, the average vineyard is about 10 hectares. Some shippers observed that about 80-100 hectares of controlled production were necessary to maintain continuity of export supply. One factor limiting the production of large (18-20 mm) grapes is the quality of planting material, most of which is vegetatively propagated. In an effort to upgrade the genetic potential of vineyards, private industry is importing small quantities of root stock from the United States and France.

There is also some concern about soil salinity and the adequacy of irrigation supplies in Maharastra, which receives on average 90-100 centimeters of rainfall annually. The problem reportedly was exacerbated by an ambitious GOI planting program for horticultural crops. The plan targeted a total planted area of 1.0 million hectares by the end of Plan VIII (1992-1997), and offered incentives such as paying 100 percent of labor costs and 75 percent on fertilizers, pesticides, and planting material.

Assuming India is able to cope with these agronomic challenges, there is potential for abundant supplies of high-quality grapes for the export market.

Competitive Outlook in the Year 2000

If India sustains its economic reforms and continues to grow, it will likely become an exporter of considerable volumes of horticultural commodities. Recent GOI policy toward crop improvement and infrastructure development will probably encourage a steady supply of commodities to export channels. Perhaps the most important element is the large group of Indian entrepreneurs who have responded to new trade opportunities, as the case of Maharastra table grapes illustrates. The challenge will be for the GOI to keep its economic reforms on track. India's entry into export markets for table grapes is presently complementary, and not seen as competition in U.S. markets. However, significant improvements in crop quality and export infrastructure could present some concern for U.S. suppliers in the future.

(For further information on supply, distribution, and trade, contact Ross Kreamer, 202-720-9903. For information on production, contact Kelly Kirby at 202-720-6791.

MACADAMIA SITUATION FOR SELECTED COUNTRIES

The Macadamia is becoming a very popular nut in world markets. During the last 10 years, macadamia production and trade have risen, following increased demand and good international prices. Total macadamia production and exports, inshell basis, in 1993/94 in selected countries are forecast to increase 6 and 8 percent, respectively. The United States is the world's largest macadamia trader. Exports of macadamia kernels from the United States increased more than 200 percent from 1988 to 1993. Moreover, world markets remain in short supply and the potential for further expanding U.S. exports is promising. Market promotion efforts should maintain demand for U.S. macadamia nuts, which are mainly used as a snack, by candy and ice cream manufacturers, and bakeries. The United States also is a major importer of macadamias to meet domestic consumption needs during the offseason.

Summary

Total macadamia production, inshell basis, in 1993/94 in selected countries is forecast at 43,950 metric tons, up 6 percent from the 1992/93 output. Increased production is expected in Australia, Brazil, Costa Rica, Guatemala, and South Africa, mainly the result of more trees coming into commercial production. On the other hand, unfavorable weather conditions in the United States and Kenya reduced 1993/94 macadamia crop prospects. However, there is considerable potential for macadamia nut supplies to increase. Plantings in major producing countries are relatively new and have not yet reached full production capacity. The United States is the leading macadamia producer in the world, followed by Australia, Kenya, and Costa Rica.

Macadamia exports by selected countries in 1993/94 are expected to increase 8 percent to 28,571 tons. Expanded shipments are expected from Australia, Costa Rica, and Guatemala. Increased supplies combined with strong international demand and prices are the reasons for the likely increase in international sales. The United States and Australia are the world's leading macadamia suppliers, accounting for about 70 percent of selected country exports.

Australia

Australia is the second largest macadamia producer in the world, after the United States (Hawaii). Australia's macadamia production in 1993/94 is forecast at 12,400 tons, inshell basis, 22 percent above the 1992/93 output. The expected increase in output is due to favorable weather conditions in New South Wales and Queensland, where more than 95 percent of commercial macadamia production is centered. More than 6,000 hectares are planted to macadamias with the majority of trees yet to reach maturity and full yield potential. Moreover, significant areas are still being planted. Consequently, Australia could be the largest macadamia producer by the turn of the century. Production has increased dramatically in the past decade, from 1,700 tons in 1982/83 to 10,200 tons in 1992/93.

The Australian macadamia nut industry is highly export oriented. Shipments in 1993/94 are forecast to increase 18 percent to 9,500 tons, inshell basis. Australian macadamia exports consist primarily of bulk raw kernels. The United States is Australia's largest export market accounting for about 55 percent of total exports in 1992/93. The Asian market is the next largest with around 40 percent of exports, mainly to Japan and Hong Kong. Small quantities of inshell nuts are sold in domestic

fresh produce stores. However, the vast majority of Australian macadamias are dried, cracked and further processed.

The Australian Horticultural Corporation (AHC) assists the Australian macadamia industry in developing quality assurance schemes and market promotion activities. The AHC recently developed advertising to be included in the international nut industry magazines, ***The Cracker*** and ***The Clipper***, which will promote the macadamia as an indigenous Australian nut. The AHC's domestic marketing program has concentrated on consumer awareness of the macadamia nut. This program has included the distribution of media kits to targeted media outlets.

Brazil

The 1993/94 Brazilian macadamia crop is estimated at 930 tons, up more than 50 percent over the 1992/93 crop. The sharp increase in production is the result of more trees coming into commercial bearing stage of production. Brazil's commercial macadamia orchards are relatively new. Total area planted with macadamia trees is estimated at 5,350 hectares, but only about 1,140 hectares are in production. Production is mostly concentrated in the states of Sao Paulo, Bahia, and Espirito Santo.

Domestic consumption of macadamia nuts is still very small, mostly due to the lack of consumer awareness of the product. Also, Brazil is a major producer of peanuts, cashew, and Brazil nuts. These nuts have more market penetration and are lower priced. Consumer also appreciate imported nuts such as almonds, hazelnuts, pistachios, and walnuts. Macadamias are sold only in few places in major cities such as Sao Paulo and Rio de Janeiro, usually together with imported nuts. Some confectionery and snack food companies are also using increased amounts of macadamias.

Brazil's commercial exports of macadamias are insignificant because of limited supplies and quality that does not yet meet international standards. However, exports are expected to increase in the coming years as production expands and quality improves.

Costa Rica

Costa Rica's macadamia production in 1993/94 is forecast to increase 11 percent to 3,000 tons due to more trees coming into production. Macadamia production in Costa Rica has been increasing steadily in the last few years as the areas planted in the mid-1980's have begun to bear. Output is expected to increase substantially by 1996, when most of the areas planted will begin to produce or will reach full production capacity of about 6,000 tons. Costa Rica's macadamia crops are centered in the Atlantic region (Turrialba, Jimenez, Guacimo, Siquirres, and Pococi), the Northern region (San Carlos, Sarapiqui, Tilaran, Upala, and Guatuso), and in the Southern region (Coto Brus, and Perez Zeledon). The industry is made up of approximately 730 producers and three processing plants.

Costa Rican macadamia consumption has been growing. About 30 percent of the macadamia nuts produced in Costa Rica remain in the domestic market each year. Macadamia nuts are consumed mainly as a snack and smaller amounts are used by candy and ice cream processors, and bakeries.

The macadamias produced in Costa Rica, which are mainly for export, are of good quality and meet international standards. Costa Rican macadamia exports normally account for about 65 to 75 percent of total annual production. Exports in 1993/94 are forecast at 2,250 tons, up 7 percent from the amount exported in 1992/93. The United States is the principal market for Costa Rican macadamias, which enjoy duty free treatment under the Caribbean Basin Initiative. Other important markets include the Netherlands, El Salvador, Japan, and Belgium. Macadamia exporters in the past have received a tax rebate of 15 percent on the F.O.B. value of macadamia exports. However, this incentive was eliminated for new exporters in December 1992, and only firms which had the right to the rebate prior to its elimination will continue to receive it until 1999, when the program will end.

Costa Rica usually does not import macadamia nuts, although there are no quantitative restrictions, minimum import prices or variable levies. The tariff on fresh macadamia nuts is 19 percent plus a 1 percent fixed tax. On the other hand, dried or processed product pays a 10 percent selective consumption tax and a 10 percent sales tax in addition to the tariff and the fixed tax.

Guatemala

Guatemala's macadamia production in 1993/94 is forecast to increase for the third consecutive year to 1,881 tons, up 19 percent from production in 1992/93. Moreover, the Guatemalan macadamia crop is expected to continue increasing significantly over the next several years. New plantings entering the commercial stage of production, combined with increased average yields of more mature trees, are the reasons for the likely increase in macadamia output. Macadamia plantations are concentrated (about 90 percent) in the departments of San Marcos, Quetzaltenango, Suchitepequez, Solola, Alta Verapaz, Chimaltenango, and Santa Rosa. There are only two significant producer/exporter companies in Guatemala, Agronomicas de Guatemala, which has about 80 percent of the Guatemalan macadamia nut export market, and Operaciones Internacionales, which accounts for most of the rest. Although both companies own macadamia plantations, they simultaneously purchase macadamia nuts from individual producers for processing and export. There are also a few macadamia producers who own smaller plants for macadamia processing.

Consumption of macadamia nuts in Guatemala is very low relative to production levels. The reason is that consumer prices for macadamias in Guatemala are very high compared to other nuts. For example, in February the average retail price was about $4.84 per pound. Also, most of the Guatemalan population is not familiar with macadamia nuts and their uses. During 1992, Guatemala consumed only 10 tons of inshell macadamia nuts. Consumption in 1993 is estimated at 15 tons and is forecast to remain unchanged in 1994. Most of macadamia nuts in Guatemala are consumed as snacks with a small portion utilized in confectionery, candies, and ice cream.

Guatemalan macadamia exports in 1993/94 are forecast to increase by one quarter to 2,216 tons due to increased production and to an expected rise in world demand. The largest export market for Guatemala's macadamias is the United States, where Guatemala has duty free treatment under the Caribbean Basin Initiative. Other major destinations include Canada and Mexico. Since 1993, Guatemalan macadamia exports have also included some macadamias purchased from Costa Rica. Imports of inshell macadamias from Costa Rica are processed in Guatemala and re-exported to other countries. Costa Rican macadamia nut producers have had problems with receiving payments from Costa Rican processors and so prefer selling nuts to Guatemalan processors which operate on a cash basis. Macadamia exports are mostly shelled, with only a small portion of exports being inshell.

Kenya

Kenya's production of macadamia nuts in 1994 is forecast to decrease for the second consecutive year to 3,070 tons, down 7 percent from production in 1993. The decline is attributed to prolonged dry weather experienced in major growing areas during the flowering period. The unfavorable weather combined with heavy insect damage adversely impacted kernel recovery. Total kernel output in 1994 is forecast at 400 tons compared to a record level of 485 tons in 1993. Kenya's macadamia industry is dominated by small-scale farmers which account for more that 90 percent of total output. Large-scale production is limited to the Kenya Nut Company (KNC) and Bob Harries Limited. Until recently, Kenya's macadamia processing and exporting had fallen exclusively to KNC (with processing capacity of 10,000 tons of nuts annually) through a restrictive licensing arrangement with Kenya's Ministry of Agriculture. However, in early 1992 the Government of Kenya also licensed the Kenya Farmnut Cooperative Society (KFCS) to process macadamia nuts. Competition between these two firms has resulted in a significant increase in grower prices for inshell nuts during the past year and a half.

Production of macadamia is found throughout Kenya, although it tends to be concentrated in the coffee growing areas of Central and Eastern Provinces.

Approximately 90 percent of all Kenyan macadamia nuts marketed domestically do not meet export quality standards. A small quantity of export-quality kernels is sold locally to the hotel and tourist industry. Domestic consumption in 1994 is forecast to reach 13 tons (kernels), up from 11 tons a year earlier. A reduced conversion factor from dry-inshell basis to kernels is anticipated in 1994 due to the unfavorable weather. The lower conversion factor rate translates into a larger quantity of off-color and smaller sized kernels which will not meet export grade standards.

Kenya's macadamia exports in 1994 are estimated at 3,300 tons (inshell basis), down slightly from 3,365 shipped a year earlier. The reduction in exports is the result of reduced carry-in stocks and the lower production projected this year. Kenya's sales of macadamias (99 percent kernels) focus on its key export markets, Germany and Japan, which accounted for nearly 95 percent of total export shipments in 1993. Exports to the United States continue to rise, reaching about 57 tons (kernels) in 1993. Nevertheless, Kenya's macadamia exports to Japan during the past two years have declined largely due to the marked growth in sales to Germany and increased competition in the Japanese market from Hawaiian and Australian nuts.

South Africa

In South Africa, the 1993/94 macadamia nut crop is forecast to reach 1,350 tons, inshell basis, up 7 percent over the 1992/93 output. In 1980 about 80 tons of shelled macadamias (kernels) were produced, which increased to 400 tons by 1986. Since then the production increased to about 600 tons of kernels in 1992. The increase in production was interrupted by a serious drought in 1993, when only about 440 tons of kernels were produced.

During the 1980's, about 90 percent of total South African macadamia production was exported. With the increase in production in 1990 and 1991, new overseas markets had to be found. Exports in 1993/94 are forecast at 750 tons (inshell), up 15 percent from shipments in 1992/93. The South African macadamia industry is new, and only recently organized a producer organization.

United States

The 1993/94 U.S. macadamia crop is forecast to decrease 2 percent to 21,319 tons, inshell basis, which is the fourth consecutive year of decline since the record 1989 crop. Dry weather in the central Kona growing area upset normal flowering, produced smaller kernel size, and promoted insect damage to macadamia crops. Replanting of existing orchards with younger trees in recent years is also a factor in the lower yields. Compared with the 1992/93 crop, yields for the current season dropped 200 pounds to an average of 2,500 pounds per acre. The United States is the world largest producer of macadamia nuts, with practically all of its production concentrated in the state of Hawaii.

Although production is expected to decline, the 1993/94 season-average grower price remained unchanged from last season at 68.0 cents per pound.

The United States is also the world largest trader of macadamia nuts. All U.S. macadamia exports are in kernel basis. U.S. macadamia exports in 1993/94 are expected to remain unchanged from 1992/93 shipments. Continued strong demand in key international markets is expected to hold U.S. macadamia export prospects. About 90 percent of total U.S. macadamia exports are destined to Asian markets. Leading Asian customers are Japan, Hong Kong, South Korea, and Taiwan. U.S. macadamia nuts are well known for their good quality and compliance with international standards.

As a big macadamia consumer, the United States imports a great part of its consumption. Macadamias are imported during the of-season, mainly from Australia. About 98 percent of total U.S. macadamia imports are in kernel form, which are destined for U.S. consumers. Macadamia imports in 1993/94 are forecast to increase 16 percent to 10,850 tons, inshell

basis. The increase is due to lower expected production.

(For further information, contact Samuel Rosa at (202) 720-9792. For information regarding production, contact Kelly Kirby at (202) 720-6791.)

MACADAMIA: PRODUCTION, SUPPLY & DISTRIBUTION
(Metric Tons, Inshell Basis)
Marketing Years 1991/92-1993/94

Country/ Marketing Year	Beginning Stocks	Production	Imports 1/	**Total Supply**	Exports 2/	Domestic Consumption	Ending Stocks	**Total Distribution**
Australia 3/								
1991/92	0	6,901	0	6,901	3,538	2,600	763	6,901
1992/93	763	10,200	0	10,963	8,076	2,887	0	10,963
1993/94 **F**	0	12,400	0	12,400	9,500	2,900	0	12,400
Brazil 4/								
1991/92	0	360	0	360	0	360	0	360
1992/93	0	600	0	600	2	598	0	600
1993/94 **F**	0	930	0	930	5	925	0	930
Costa Rica 5/								
1991/92	0	2,200	0	2,200	1,104	850	246	2,200
1992/93	246	2,700	0	2,946	2,100	700	146	2,946
1993/94 **F**	146	3,000	0	3,146	2,250	750	146	3,146
Guatemala 5/								
1991/92	0	1,429	0	1,429	1,359	10	60	1,429
1992/93	60	1,588	181	1,829	1,769	15	45	1,829
1993/94 **F**	45	1,881	350	2,276	2,216	15	45	2,276
Kenya 5/								
1991/92	223	3,555	0	3,778	3,085	109	584	3,778
1992/93	584	3,299	0	3,883	3,365	77	441	3,883
1993/94 **F**	441	3,070	0	3,511	3,300	96	115	3,511
South Africa 5/								
1991/92	0	1,715	0	1,715	1,000	715	0	1,715
1992/93	0	1,260	0	1,260	650	610	0	1,260
1993/94 **F**	0	1,350	0	1,350	750	600	0	1,350
United States 3/								
1991/92	0	22,453	5,800	28,253	9,450	18,803	0	28,253
1992/93	0	21,772	9,330	31,102	10,550	20,552	0	31,102
1993/94 **F**	0	21,319	10,850	32,169	10,550	21,619	0	32,169
Total								
1991/92	223	38,613	5,800	44,636	19,536	23,447	1,653	44,636
1992/93	1,653	41,419	9,511	52,583	26,512	25,439	632	52,583
1993/94	632	43,950	11,200	55,782	28,571	26,905	306	55,782

1/ U.S. imports were converted to inshell basis using a recovery rate of 0.23 for the three marketing years. U.S. imports also include a small quantity of inshell macadamias.

2/ U.S. exports were converted to inshell basis using a recovery rate of 0.24 for 1991/92, 0.215 for 1992/93, and 0.20 for 1993/94. U.S. export estimates do not match Census Bureau data, which are likely understated. Estimates from U.S. Economic Research Service

3/ Marketing year begins in July 1 of first year shown.

4/ Marketing year begins in May 1 of first year shown.

5/ Marketing year begins in January 1 of second year shown.

CANNED DECIDUOUS FRUIT SITUATION FOR SELECTED COUNTRIES

Although world production of canned deciduous fruit is forecast lower in 1993/94 for both Northern and Southern Hemisphere suppliers, burdensome carryover stocks and stagnant demand will likely dampen prospects for many shippers. Marketing opportunities for canned fruit in 1993/94 will continue to present challenges for the United States and other exporting countries. The pace of U.S. exports of aggregate canned deciduous fruit for the first three quarters of 1993/94 is lagging behind the same period last year. However, U.S. canned peach exports are showing some vitality, as shipments are running about six percent ahead of last season at this time. Industry sources believe that the process leading up to the North America Free Trade Agreement (NAFTA) has strengthened the position of U.S. canned fruit in Canada and Mexico by clearing many of the non-tariff obstacles facing U.S. product. Continued recession in some of the European Union countries and persistent economic problems in other major markets suggest stagnant demand in the coming months. These factors will aggravate the imbalance in the supply situation and heighten competition among exporters. This situation could spill over into 1994/95, as many Northern Hemisphere countries begin to assess prospects for the next crop.

CANNED PEACHES

The canned peach situation for 1993/94 is characterized by contracting production and slightly higher exports. Total canned peach output in selected countries during 1993/94 is forecast at about 677,000 tons, slightly more than 17 percent lower than the previous season (see Horticultural Products Review, December 1993). Anticipated declines in Greece, Italy, and Spain more than offset gains in Argentina. Declines in 1993/94 have helped to relieve some of the supply pressure, which had burdened an already competitive situation in 1992/93. Production in the selected countries in 1992/93 has been revised upward slightly to 819,450 tons. Total 1993/94 exports from selected suppliers are forecast at 476,500 tons, almost two percent above the previous year. Sharply lower production and modest gains in export volume are expected to contribute to lower carry-out stocks in 1993/94.

EUROPEAN UNION (EU)

The EU continues to dominate all phases of the canned peach industry. Led by Greece, Italy, and Spain, the EU accounts for about 75 percent of total production from selected countries. For marketing year 1993/94, the EU's guaranteed limit on support prices for peaches is 582,000 tons, far in excess of EU canned peach production forecast at almost 490,000 tons. The EU is also the world's largest consumer of canned peaches, accounting for slightly more than half of total utilization in the surveyed countries. The EU is largely self-reliant with respect to canned peach production, with intratrade supplying about 90 percent of total imports. On the export side, the EU also holds a commanding position in many third-country markets. Depressed canned peach prices coupled with stagnant demand from export markets have led to reduced processing margins and the exit of some European canners from the industry. This somber tone is expected to remain throughout 1993/94.

GREECE

Greece is the premier packer of canned peaches in the EU, with production in 1993/94 forecast at about 297,500 tons or about 60 percent of total EU output. Greek production in 1992/93 is revised upward slightly from previous estimates to a record 364,183 tons, based on official data. Lower prices, high carry-over stocks and stagnant export demand contributed to the lower pack for 1993/94. Sales from the 1993 pack are reportedly good, although contract prices are about 28-33 percent lower than those of a year ago. According to Greek industry insiders, the canners have limited control over production costs because of EU regulations governing grower prices, sugar prices, and the level of production subsidy. Internal Greek regulations also control labor and energy costs. Some canners reportedly doubt they will be able to continue operating if prices do not improve. Buyers in Germany, the dominant export market, reportedly are exerting considerable pressure on Greece for lower prices.

Despite assorted problems plaguing the industry, Greek canned peach shipments reached an estimated 312,875 tons in 1992/93, a new record. For the current year, exports are forecast not to exceed 300,000 tons, based on lower production and expected slack demand from export markets. The quality of packed product is good this season. Although the pit fragment problem persists, the industry considers it to be under control. Greece is extremely active in non-EU export markets, where it is a fierce competitor of the United States. In some markets such as Brazil and Argentina, Greek canned fruit now faces antidumping charges and countervailing duties. Greece is also the major supplier of imported canned peaches to the United States.

The Greek canned peach industry receives assistance from the EU through annually authorized: 1) minimum price to growers for fruit delivered for processing, 2) processing aid to packers, and 3) a minimum withdrawal price on fresh peaches. In an effort to alleviate a burdensome supply situation, Greece allegedly destroyed approximately 580,000 tons of assorted fresh fruit in 1993 under provisions of the EU's Common Agricultural Policy. Reportedly, there are no direct export subsidies for canned peaches.

Financial woes, falling product prices, and slipping demand from the EU member states spell difficulties for the Greek canned fruit industry. For example, it continues to be plagued by the government's tight money policy. Although bank rates were lowered on January 1, 1994, commercial interest rates remain high at about 25 percent. A lower peach pack and fairly robust exports are forecast to reduce carryout stocks to a more manageable level of 35,000 tons. Still, prices are not expected to improve, and this will further pressure Greek canners this season.

SPAIN

Spanish canned peach production for 1993/94 is expected to reach 93,400 tons, a 29 percent drop from last season's record pack. The lower outturn reflects a smaller peach crop and lower deliveries to canners. As is reportedly the case in Greece and Italy, many of Spain's canners are financially strapped from high interest rates and low returns. However, a recent move towards increased consolidation has led to significant improvements. Leading firms are beginning to invest in plant modernization and expansion, and are starting to diversify product lines. In the important canning region of Murcia, the government will reportedly provide funding for a technology research center.

Spain is primarily a fresh fruit market, with only about 10 percent of the 1993 peach crop delivered to canners. After steadily rising over the past several years, domestic consumption of canned product in 1993/94 is expected to be unchanged from last year at 93,400 tons.

Spain ranks third among EU states behind Greece and Italy in terms of canned peach exports. The substantial devaluation of the Spanish peseta helped boost exports in 1992/93, and will likely sustain shipments at the 25,000-ton level in 1993/94.

ITALY

Italian canned peach production in 1993/94 is forecast at 70,000 tons, a decline of about 29 percent as fresh fruit outturn declined to more normal levels after exceptional yields in 1992. Lower availabilities have helped to reduce stocks in the current climate of sluggish EU demand and flat domestic consumption. However, there has been some concern for the health of the canned peach industry. Stiff competition from low-priced Greek peaches in the domestic market has resulted in a critical situation in the Italian industry. Continued gains in fresh fruit consumption have further pressured the canned fruit industry. Some companies have reportedly closed production lines for canned peaches, and one of the largest canned fruit packers, Agritalia, filed for bankruptcy in 1993.

Despite the gloom in the industry, exports in 1993/94 are forecast at 44,000 tons, a 10 percent increase over the previous year. The following table shows the extent to which Italy depends on neighboring EU countries as markets for its canned peaches. Over the past six years almost 90 percent of Italy's total export volume has gone to other EU countries.

Italy: Exports of Canned Peaches, 1988-1993
(Metric Tons, net weight)

MARKET	1988	1989	1990	1991	1992	1993
U.S.	745	1,479	0	0	40	16
Saudi Arabia	1,704	896	1,332	1,985	431	N/A
Austria	395	473	854	980	1,014	N/A
Switzerland	256	232	137	189	246	N/A
Sweden	182	188	523	460	160	N/A
Germany1/	14,790	12,146	23,281	24,764	23,112	22,900
U.K.	5,843	7,102	6,399	7,168	7,557	5,300
Total EC	27,03	25,825	38,823	44,586	39,214	38,400
Others	3,968	3,645	3,437	5,170	3,263	5,884
TOTAL	31,001	29,470	42,260	49,756	42,477	44,300

Source: Eurostat data 1988-1992, Agricultural Affairs office for 1993.
1/Exports before 1991 are from West Germany.

FRANCE

Peaches are the leading canned fruit produced in France. Canned peach production increased significantly between 1978 and the mid-1980's, thanks to processing subsidies authorized by the EC. The peach pack has remained comparatively stable since then, and is estimated to have declined in 1993 mainly due to a reduced fresh crop of "Pavie", the primary variety used for canning. Production for 1993/94 is set at 27,700 tons, the smallest for the past ten years.

France is a net importer of canned peaches. Canned peach imports in 1992/93 accounted for about half of domestic consumption. Imports are expected to continue to decrease in 1993/94 in response to sluggish domestic demand.

For several years, French imports of U.S. canned peaches have been nil or very small. Opportunities for developing a market for U.S. product are limited due to stiff competition from low-priced deliveries from southern EU countries. However, the presence of South African canned peaches shows there is apparently some scope for a limited market for competitively-priced, high quality product from outside the EU. Exports this season are expected to rise to 5,000 tons on slightly stronger demand from Germany, France's largest export market.

SOUTH AFRICA

South Africa is an export-oriented supplier of canned fruit, with about 95 percent of canned peach production in 1993/94 (crop harvested late 1993 and early 1994) destined for foreign markets. Production this year is forecast at 58,000 tons, down about 22 percent from the previous record year due to slumping demand from export markets and low domestic prices paid for canning fruit. In fact, the marketing agreement collapsed in the wake of the failure of the Canning Fruit Board to produce an agreement between canners and growers on minimum prices for fruit.

The breakdown of the marketing scheme also created problems for exports, as selling prices in major markets were determined by the Canning Fruit Board. Near the end of 1993 some canners began undercutting the minimum selling prices to certain markets. Prices in overseas markets dropped by an average 30 percent from last year's levels. Producers are reportedly being advised not to pull orchards, but rather to ride out the current recession because the long-term prospects for canned fruit exports are favorable. About 75 percent of South Africa's exports are usually shipped to Japan and EU markets. A lower pack and slightly higher export demand are expected to help shrink stocks in 1993/94 by 20 percent to 35,000 tons.

AUSTRALIA

The forecast for Australia's canned peach production for 1993/94 is 32,000 tons, a moderate decline due to lower cannery intake. Late season flooding and rapid fruit maturation led to some fruit splitting and reduced yields. Comparatively higher returns vis-a-vis the canning peach market meant that the bulk of peach production was delivered to the fresh market. Cannery intake was reportedly also reduced due to depressed prices resulting from the release on the market of stocks following the collapse of the Letona cannery in New South Wales.

Exports are forecast to increase to 15,000 tons in 1993/94, despite continued tough competition, especially from subsidizing suppliers in the EU. The Australian canned peach industry remains concerned about the impact of the North American Free Trade Agreement (NAFTA) on shipments to Canada, its major export market. The Australian government continues to press for similar tariff treatment from the Canadians under the Canadian-Australia Trade Agreement (CANATA), which sets forth that tariffs on Australian product entering Canada should not exceed tariffs imposed on a third country. Canada accounted for about a third of Australia's total canned peach exports in 1993.

Imports fell sharply in 1992/93 and are forecast to rise slightly to only 500 tons in the current year. This is due mainly to action taken against China and Greece under provisions of the Australian Anti-dumping Authority. The Authority concluded that exports of canned peaches from Spain and Greece had been sold at prices below the normal value in their respective markets. Countervailing duties were imposed on shipments of canned peaches from Spain and Greece, and anti-dumping duties were placed on product from Greece and China. The countervailing duties on canned peaches from Greece and Spain were calculated at A$4.38 and A$4.54 per carton (24 kilogram gross), respectively. Most imports are destined for the lower priced generic end of the market. This market has grown due to the protracted economic downturn in Australia. In future years, imports will likely be limited by several factors: 1) local production of generic labels, 2) an anticipated upturn in the Australian economy, and 3) buyer resistance to imported product because of higher cost due to CVD and Anti-dumping duties.

ARGENTINA

The outlook for the 1993/94 Argentine peach pack is 50,000 tons, an increase of about 60 percent from last season's weather-reduced pack. The bulk of Argentina's canning peach crop is grown under irrigation. Canning usually begins in January and ends in late March. About a third of the fresh peach harvest was packed in 1994.

Argentina's presence in the world canned peach market is influenced by local production.

Argentina is expected to import and export equal amounts during 1993/94. Last year's weather-reduced harvest and lower local peach pack spurred imports of about 16,400 tons and all but eclipsed exports. A recovering economy, lower import duties, and simplification of import procedures are expected to stimulate larger trade volumes in coming years. Currently, canned fruit imports from Greece are assessed an antidumping charge of $2.50 per case (24 2 1/2 cans). Imports from Chile qualify for a 28 percent regional discount, which lowers the duty to 7.2 percent ad valorem.

One Australian canner has reportedly installed a newly developed automatic fruit sorter, an innovation which has implications for the industry. The machine is able to monitor up to 10 individual fruit per second, sorting for a wide variety of characteristics. Information on each fruit inspected is gathered and stored. This computerized system allegedly has the potential to replace traditional methods of sorting by eye and hand, and was unveiled at the recent World Canned Deciduous Fruit Conference in Shepparton, Australia.

CHILE

Favorable weather during the growing and harvesting seasons are expected to contribute to a slight increase in peach output for canning and a higher peach pack in 1994, forecast at 34,500 tons. Canned peaches are produced mainly for the more lucrative export market. Declining real prices, limited domestic demand, and narrowing margins have forced the industry to reorient production toward foreign markets over the past few years.

Exports of canned peaches are expected to decline slightly in 1993/94 to 23,500 tons based on reduced shipments to Argentina following an improved peach harvest in that country. The United States used to be Chile's largest export market, taking about 60 percent of exports. However, exports to the United States have dropped dramatically, with the U.S. share representing a mere five percent of total shipments. The continued revaluation of the peso and stiff competition by Greece have made the U.S. market less profitable and forced the Chilean canners to increase third-country marketing efforts. This has included Mexico and Japan.

JAPAN

Japan's production of canned peaches in 1993/94 is forecast at 14,000 tons, a decline of about 25 percent from the previous year. This decline is attributed to high carry-in stocks, weak consumer demand, and, to some extent, a shift from canning peaches to higher-value fresh market varieties. Japanese canned peach production accounts for about a quarter of total annual consumption, the balance coming from imports. Over 75 percent of the Japanese peach pack are white peaches, the remainder being yellow peaches.

Canned peach imports during 1993/94 are expected to reach a record 54,000 tons, as recessionary pressures have sharply increased the attractiveness of low-priced foreign product. This move toward cheaper imports has primarily benefitted product from Greece, China, and South Africa, suppliers which now collectively account for about 75 percent of the market. U.S. canned peaches have benefitted from promotional activities targeting public school lunch programs and fruit combinations with ice cream and frozen yogurt. The following tables show how comparatively lower-priced Greek and Chinese product have made inroads in this market.

JAPAN: Imports of Canned Peaches by Country of Origin
(Calendar Years/ Metric Tons)

Origin	1991	1992	1993
South Africa	11,937	12,066	11,885
Greece	10,657	14,172	16,088
China	6,719	4,145	13,289
Chile	5,210	5,522	3,321
Australia	5,144	3,561	2,772
Korea	2,498	960	590
United States	7,988	6,391	7,016
Others	101	288	631
TOTAL	50,254	47,105	55,592

Source: Customs Bureau, Japan Ministry of Finance, in FAS post report JA4028

JAPAN: Average Import Price of Canned Peaches by Country of Origin 1/
(Yen/Kilogram, CIF 2/)

Origin	1991	1992	1993
Greece	138	135	118
South Africa	148	156	131
United States	173	175	148
Australia	156	164	133
China	150	123	99
Chile	156	179	150

Source: Customs Bureau, Ministry of Finance, GOJ, in FAS post report JA4028
1/ Average for retail size cans, mainly 2-1/2 and 303.
2/ Average exchange rate (yen to one US dollar): 1991=135; 1992=127; 1993=112.

CANNED PEARS

The canned pear situation in 1993/94 is characterized by lower production, lower exports, and some drawdown in stocks. Total canned pear production in the six selected countries in 1993/94 is forecast at 153,580 tons, a decline of about 20 percent from last year. Substantial declines in Italy and South Africa account for most of the reduction. Indeed, there were significant year-on-year declines registered for all reporting countries. The lower pack for 1993/94 reflects the continued competitive situation in world markets. Total exports by the selected suppliers are expected to reach about 105,200 tons, slightly lower than the level recorded in 1992/93. In fact, the estimate for exports last year is revised upward from 98,600 tons to 111,976 tons, as suppliers cut prices to ease the burdensome world stock situation. Continued sluggish demand in 1993/94 is expected to result in only a small decline in stocks.

EUROPEAN UNION

The EU has a dominant position in the global pear industry. Collectively, the EU is both the world's largest producer and consumer of canned pears. Only Australia exports more canned pears than the EU, which is led by Italian shipments primarily to other EU markets.

Germany is the largest EU market for canned pears. Last year's record production combined with stagnant domestic consumption contributed to a four-fold increase in stocks. Although EU production for 1993/94 is estimated to have fallen by 25 percent, continued sluggish demand by both EU consumers and export markets will again lead to high carryover stocks, forecast at 46,200 tons. This will likely add further downward pressure on prices.

ITALY

Italy's subsidized canned pear industry is export driven. Production for 1993/94 is forecast at 50,000 tons, a decline to more usual levels following last year's exceptionally large pack. The decline is mainly due to the fall in fresh fruit production. Although the 1993 pack was lower, stocks are not likely to be pared from the high levels of 1992/93. This is because Italian consumers reportedly prefer fresh fruit, a situation which has contributed to stagnant demand for canned product. Italy is the EU's leading exporter of canned pears, most of which are shipped to neighboring EU countries. Exports in 1993/94 are expected to rise slightly to 36,000 tons, the highest level in four years as a devalued Lira makes export prices attractive.

SPAIN

Spanish canned pear production for 1993/94 is expected to reach 14,200 tons, based on a lower pear crop and revisions of the 1993 pack. About 80 percent of the pear crop comes from Navarra region, the balance from Murcia. Reportedly only about three to four percent of the 1993 pear crop was canned. As is the case with Spain's canned peach industry, the canned pear industry is also facing restructuring that includes some consolidation and substantial increases in investment. Reportedly, 31 firms participated in the 1993 pear pack.

Spain is expected to export about 8,000 tons in 1993/93, an increase of 25 percent above the level in the previous year. The rise is attributed to a devaluation of the Spanish peseta. Other EU countries took an estimated 87 percent of Spain's total canned pear exports in calendar 1993. Spain ranks a distant second after Italy in terms of canned pear exports.

FRANCE

French canned pear production for 1993/94 is expected to reach 27,200 tons, a slight drop from the previous year. The canned pear pack in 1993 is estimated to have declined from last season's record level as a result of a smaller fresh crop of Williams pears, the main canning variety. Pear production has not increased significantly since 1979, when EU processing subsidies were first instituted for this fruit. The reduced area and advancing age of orchards planted to the Williams variety have limited production and led to seasonal fluctuations in the volume of pears delivered to processors.

France is a net importer of canned pears. Imports in 1993/94 are expected to reach 18,400 tons, or about 40 percent of domestic consumption. Italy remained France's leading supplier of canned pears in calendar 1993, accounting for about half of total imports. Spain, Australia and South Africa also supplied decreasing amounts to France during 1993. France's canned pear exports typically find markets in neighboring EU countries.

AUSTRALIA

Canned pear intake for the 1993/94 season fell due to a weather-affected lower crop in the Goulburn Valley region of Victoria. Production of canned pears is forecast at 41,000 tons, a nine percent decline from the previous year. The Australian canned pear industry is focused on exports, as domestic consumption accounts for only about 15 percent of production. Stagnant consumption stems in part from improved availability of fresh fruit.

Australia is a major supplier of canned pears to the EU, which accounted for about a third of Australia's exports in 1993. Total exports in 1993/94 are expected to reach 39,000 tons, a decline to normal levels following the record set in the previous year. A devalued Australian currency helped boost exports in that year and has contributed to the lowest level of stocks in several years. Australia entered the U.S. market

after a two year hiatus, shipping 604 tons of canned pears. Australian canned Bartlett pears have faced an antidumping order in the United States since 1973. However, currently there is no cash deposit required on Australian product as the dumping margin was determined to be zero. This could encourage canned pear shipments from Australia to the United States.

Canned pear imports are estimated to have fallen to only 63 tons in 1992/93, due in part to antidumping action on product from China and greater availability of locally packed generic fruit. Local consumer preference in canned product has shifted somewhat to lower-priced generic labels due to the economic downturn in Australia.

SOUTH AFRICA

South Africa is a also an export-oriented producer of canned pears, diverting only about 12 percent of total supply for domestic consumption. Production in 1993/94 is forecast at 20,600 tons, a drop of about 20 percent from the previous year due in part to lower deliveries of canning fruit. Deliveries were down because of lower fruit prices. The principal canning variety is the Bon Chretien. Lower production this year will help South Africa clear some of the stocks that were overhanging the market. Among South Africa's major export markets are the EU countries.

JAPAN

Japan is producer of comparatively small quantities of canned pears, forecast to reach 580 tons for 1993/94. Most pears grown in Japan are sand pears ("Nashi"), which are mainly marketed for fresh consumption. In view of the availability of low-priced imported canned pears, domestic production is expected to remain static for the foreseeable future. Japan will rely on imports to meet consumer demand, primarily from confectioners and restaurants, and for holiday gift-giving. The table below shows that Australia is the major supplier of canned pears to Japan.

JAPAN: Canned Pear Imports by Origin
(Calendar Years; Metric Tons, net wt.)

Origin	1991	1992	1993
Australia	4,944	5,305	5,172
South Africa	1,044	1,456	1,495
United States	619	527	543
China	57	174	53
Others	188	203	178
TOTAL	6,852	7,665	7,441

Source: Customs Bureau, Japan Min. of Finance

CANNED FRUIT MIXTURES

The canned fruit mixtures situation is characterized by a moderate decline in production, with lower exports and stocks. Output of canned fruit mixtures in selected markets for 1993/94 is forecast at about 198,900 tons, a drop of almost nine percent from the previous year. Lower deliveries to canneries in South Africa and Greece account for most of the decline. EU countries pack about half the total output of the eight selected markets. Exports of canned fruit mixtures in 1993/94 are forecast at 145,200 tons, down slightly from the previous year. Stocks are expected to decline to about 30,000 tons.

ITALY

Italy leads selected countries in terms of canned mixtures production. The 1993 pack of 76,000 tons is lower than the previous year because of lower deliveries to canners. About 96 percent of Italian canned mixtures exports in calendar 1993 were destined for other EU countries. Exports in 1993/94 are forecast to remain near last year's level at 61,500 tons.

GREECE

Canned mixtures production for 1993/94 fell by half to about 11,220 tons, as fewer canners participated in the pack. Production is expected to shrink further in coming seasons due to stronger competition from both Italy and South Africa. Industry sources feel that only

improvement in the economies of markets such as Eastern Europe, the former Soviet Republics, and the Balkan countries will help alleviate the depressed situation. Greek exports continue to decline, in large part due to a lower pack and reduced export availabilities. Canned mixtures exports in 1993/94 are forecast to reach 11,000 tons, about 43 percent below last year's volume.

FRANCE

Production of canned mixtures for 1993/94 is expected to decline to 22,500 tons, due mainly to reduced supplies of both canned peaches and canned pears, and relatively large carryover stocks from the previous year. France is a net importer of canned fruit mixtures. Imports accounted for about 70 percent of domestic consumption in 1992/93. Adequate carryover stocks will bolster domestic supplies and contribute to lower imports, currently forecast at 29,200 tons for this season.

AUSTRALIA

Australia is the third largest producer of canned mixtures after Italy and South Africa. Production for 1993/94 is forecast at 31,500 tons, little changed from the previous year. Canada is the most important export market of Australia, accounting for about a third of total canned mixtures exports.

SOUTH AFRICA

South Africa dominates canned mixtures production in the Southern Hemisphere. Like Australia and Italy, South Africa is an export-oriented producer. South African canned mixtures production declined in 1993/94, based on a decline in deliveries as profit-squeezed canners offered lower prices for fresh fruit.

JAPAN

Japan is a net importer of canned fruit mixtures, with a domestic industry producing only about a quarter of annual consumption. Consumption in 1993/94 is expected to increase marginally, the result of retail promotion which has featured fruit cocktail and other canned fruit. The major supplier of canned mixtures to Japan is the United States. The following table presents Japanese imports of canned mixtures and shows the relative importance of U.S. competitors in that market.

JAPAN: Canned Mixtures Imports by Origin
(Calendar Years; Metric Tons, net wt.)

Origin	1991	1992	1993
United States	5,214	5,631	5,641
South Africa	2,515	3,070	3,795
Australia	1,374	3,070	3,795
Chile	291	348	348
Greece	91	0	105
Italy	0	3	146
Others	8	30	94
TOTAL	9,493	10,396	11,002

Source: Customs Bureau, Japan Min. of Finance

CHILE

Canned mixtures production in Chile is limited and primarily targeted for foreign markets, where profits are higher. Production for 1993/94 is forecast at 4,050 tons, of which about 91 percent is slated for export markets. Unlike canned peaches, Chilean exports of canned mixtures benefit from an graduated rebate program which is provided to "non-traditional" exports. Under this program, an exporter receives a rebate of up to 10 percent of the FOB value on sales up to a total export value of $10 million per year. Beyond that level, the rebate declines to five percent up to the point total exports reach $15 million. After that, the rebate is reduced to three percent on sales up to a total value of $18 million. There is considerable excess capacity in this program, as the total export value of Chile's canned mixtures in calendar 1993 was $3.9 million.

CANNED APRICOTS

Total canned apricot production for 1993/94 in the four selected countries is forecast 70,750 tons, a decline of 30 percent from the previous year. A sharply lower 1993 Greek apricot pack

accounts for almost 75 percent of the expected fall in total production. Exports are forecast to settle at 60,000 tons, in line with reductions in exportable supplies. Inventories are also likely to shrink somewhat.

GREECE

The volume of apricots delivered to canners for 1993/94 was about 50 percent below last season. This steep decline is due to slack demand for canned product from export markets and adequate carryover stocks. Quality of fresh fruit was adversely affected by above normal precipitation and persistent problems with the sharka virus. Production in 1993/94 is forecast at 24,300 tons, most of which will enter export channels. Exports in 1993/94 are expected to reach 25,000 tons or about 40 percent of total shipments from the selected countries.

SOUTH AFRICA

South Africa's apricot pack is primarily Bulida variety fruit. Production for 1993/94 is forecast at 22,320 tons based on smaller deliveries to canners. As the domestic market is limited and further restricted by economic woes, the canned apricot industry is mainly export-oriented. Despite sluggish demand from world markets, exports are forecast to rise to 22,000 tons in the current year. These sales are likely to be made at prices at least 30 percent lower than last season. Lower returns are expected to plague South Africa for the next few years until supply conditions balance in world markets.

SPAIN

Spain is the EU's second largest producer of canned apricots after Greece. Production in 1993/94 is expected to reach 16,000 tons, about 70 percent of which will be exported, primarily to neighboring EU markets. Spain is largely a nation of fresh apricot consumers, with only about seven percent of the apricot crop delivered to canners. The EU support scheme does not extend to canned apricots. This could possibly lead to a reduction in canned apricot production in coming years.

OUTLOOK FOR U.S. EXPORTS OF CANNED FRUIT

United States canned fruit exporters again face keen competition during 1993/94, primarily from the EU. Despite tough competition in world markets, total U.S. exports expanded in 1992/93 (June/May). The pace of shipments for the current year through February is about 12 percent below the level for the same period in the previous year. The following table presents aggregate U.S. exports of canned fruit by type. Although aggregate exports for the first three quarters of 1993/94 are lagging behind last year, peach shipments are running ahead. The pace in the last quarter of 1993/94 will need to quicken if total exports are again to expand.

U.S. Canned Fruit Exports
(Jun/May Year; Metric Tons, net wt.)

	1990/91	1991/92	1992/93	1992/93 (Jun/Feb)	1993/94 (Jun/Feb)
Mixtures	28,074	31,080	34,895	26,687	21,674
Peach	18,647	20,054	19,815	13,523	14,389
Pear	3,521	5,758	3,905	3,167	2,205
TOTAL	50,242	56,892	58,616	43,377	38,268

Source: U.. Census Bureau data

CANNED FRUIT MIXTURES

Fruit mixtures are the dominant element of U.S. trade in canned deciduous fruit. Strategic U.S. export markets include Canada and Asia markets such as Japan, Hong Kong, the Philippines, and Singapore. As the following table shows, the pace of exports for the current year (Jun/Feb) lags about 19 percent behind the same period last year. This is not unusual given the general slack tone in demand in world markets. However, the shipment data indicate continued strong demand from Canada, Hong Kong, and Singapore, and an import surge from Japan. High-cost producer Japan has taken advantage of comparatively lower priced imported canned fruit this year. The average export value (FOB) of U.S. canned fruit mixtures for the first nine months of 1993/94 was $1,189/MT, about 14 percent higher than the unit value for the same period in the preceding year.

CANNED PEACHES

The 1993 canned peach pack is revised downward to slightly over 18,000 tons (see table below), about 9 percent below the level in the previous year. Preliminary indications point to a slightly higher pack in 1994.

Among the major markets for U.S. canned peaches are Japan, Canada, Hong Kong, and Taiwan. Mexico has become an increasingly important market as economic reforms translated into higher consumer demand. Industry sources feel that the process leading up to the North America Free Trade Agreement (NAFTA) strengthened the position of U.S. canned fruit in Canada and Mexico by clearing many of the non-tariff obstacles facing U.S. product. This has led to increased optimism. The U.S. position will likely be further enhanced once Mexico's import duties (currently 13.5 percent) are phased out over the next 10 years. Accordingly, the U.S. industry has filed a petition with the USTR requesting accelerated reduction of tariffs under NAFTA.

Export prospects for 1993/94 appear good despite the huge imbalance in world supplies and the general sluggish tone in many major markets. Thus far in 1993/94 (Jun/Feb), exports of U.S. canned peaches are running ahead of the same period last year. Particularly strong demand from Canada, Singapore and Hong Kong, bolstered by a steady shipment pace to Mexico and Japan, should lead to higher exports of canned peaches in 1993/94, if the pace continues for the last three months of the year.

The United States is also an importer of sizeable quantities of canned peaches, primarily from Greece. Other suppliers include Chile, and occasionally, Italy and Spain. After a slow return to the U.S. market following the lifting of the trade ban, South African canned peaches will have a major presence in 1993/94.

CANNED PEARS

Canada, Japan, and Mexico are major markets for U.S. canned pears. The pace U.S. exports of canned pears for the first three quarters of 1993/94 is about 30 percent below that recorded in the same period last year. Burdensome carryover stocks offset declines in production in selected markets, thereby maintaining supplies at high levels in an already stagnant world situation. Of future concern on the supply side of canned pears is the growth potential for pear production in both Chile and Argentina. Limited expansion in the fresh market could result in diversion of pears to the canning industry. This is a development that will bear on future prospects for U.S. canned pears in export markets.

(For further information on supply, distribution, and trade, contact Ross G. Kreamer, 202-720-9903. For information on peach production,contact Kelly Kirby at 202-720-6791.)

UNITED STATES: Canned Fruit Mixtures Exports
(1988/89-1993/94; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	1992/93 (Jun/Feb)	1993/94 (Jun/Feb)
Canada	4,758	3,830	7,809	7,770	6,542	4,673	4,561
Japan	7,201	3,373	4,786	6,398	4,708	2,683	4,565
Hong Kong	1,433	929	2,782	3,593	3,753	2,578	2,996
Philippines	1,597	2,905	2,636	2,164	3,337	3,177	1,075
Singapore	1,403	1,798	2,105	2,089	2,662	2,179	1,989
Saudi Arabia	1,018	821	1,977	1,514	3,096	2,872	1,382
Panama	530	851	1,119	1,100	1,138	873	618
Taiwan	447	376	649	984	1,709	1,482	1,013
Mexico	946	615	538	724	501	425	304
Sweden	304	789	753	709	898	631	192
Others	3,336	2,810	2,920	4,035	6,552	5,114	2,979
TOTAL	22,973	19,097	28,074	31,080	34,896	26,687	21,674

Source: U.S. Census Bureau data
1/ Marketing year is June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

UNITED STATES: Canned Peach Exports
(19988/89-1993/94; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	19992/93 (Jun/Feb)	1993/94 (Jun/Feb)
Japan	9,013	5,850	7,420	7,593	5,812	3,796	3,582
Taiwan	3,154	1,569	2,654	2,702	1,894	1,894	1,342
Canada	1,755	1,183	1,857	2,427	2,691	1,692	2,150
Hong Kong	489	379	1,347	1,812	1,467	1,086	1,264
Mexico	273	1,653	653	1,581	1,775	1,300	1,308
Singapore	499	941	597	640	754	511	1,133
Philippines	376	755	412	552	744	673	331
Panama	407	385	358	410	266	156	224
Colombia	19	29	73	267	58	47	80
Saudi Arabia	273	249	267	266	532	396	349
Others	1,278	1,365	3,009	1,804	1,972	1,972	2,626
TOTAL	17,538	14,358	18,647	20,054	19,815	13,523	14,389

Source: U.S. Census Bureau data
1/ Marketing year: June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

UNITED STATES: Canned Peach Imports
(19988/89-1993/94; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	19992/93 (Jun/Feb)	1993/94 (Jun/Feb)
Greece	11,038	21,208	9,074	17,608	19,021	16,808	11,812
Chile	4,420	9,750	4,527	879	879	795	1,021
Argentina	1,030	4,666	107	349	373	373	3
Spain	1,129	2,803	91	142	986	986	757
Italy	69	1,428	0	0	18	18	314
Mexico	292	675	990	1	0	0	21
South Africa	0	0	0	116	382	174	2,921
Others	253	652	229	166	262	228	78
TOTAL	18,231	41,182	15,018	19,261	21,921	19,382	16,927

Source: U.S. Census Bureau data
1/ Marketing year: June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

UNITED STATES: Canned Pear Exports
(19988/89-1993/94; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	19992/93 (Jun/Feb)	1993/94 (Jun/Feb)
France	0	0	0	1,801	76	76	5
Canada	96	259	552	1,288	1,508	1,105	1,097
Japan	221	442	916	845	506	371	330
Mexico	9	362	239	381	321	300	148
Sweden	17	19	325	291	135	135	2
Denmark	0	0	195	245	71	71	0
Costa Rica	9	26	106	188	111	92	118
Italy	0	17	6	118	0	0	0
Singapore	62	82	147	109	76	61	65
Others	617	580	1,035	492	1,096	956	440
TOTAL	1,031	1,787	3,521	5,758	3,905	3,167	2,205

Source: U.S. Census Bureau data
1/ Marketing year: June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

U.S. Cling Peach Situation and Outlook 1/
(Metric Tons)

	1991/92	1992/93	1993/94
Deliveries to Canners	498,326	570,007	528,959
Paid tons Packed	468,060	537,107	498,781
Peach Pack 2/	16,908	19,922	18,078
Beginning Stocks	2,271	1,500	3,200
Total Supply 3/	19,179	21,422	21,278
Disappearance 4/	17,681	18,222	18,678
Ending Stocks	1,500	3,200	2,600

Source: California Cling Peach Advisory Board, 1994

1/ Data are not official USDA data and are intended to show trends in the U.S. situation; 1993/94 data are forecast.

2/ Pack estimates are for crop year.

3/ Total supply implies U.S. production and does not include considerable imports, which for the three marketing years presented were: 15,018 tons, 19,261 tons, and 21,921 tons; imports are primarily from Greece.

4/ Disappearance includes exports.

Canned Peaches: Production, Supply, and Distribution
(Metric Tons, net weight)/1

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
France							
1990/91	3,800	34,300	31,500	69,600	2,700	61,600	5,300
1991/92	5,300	31,400	27,800	64,500	3,800	57,700	3,000
1992/93	3,000	32,200	24,500	59,700	4,000	51,300	4,400
1993/94	4,400	27,700	22,000	54,100	5,000	48,100	1,000
Greece							
1990/91	35,500	251,876	604	287,980	247,767	16,713	23,500
1991/92	23,500	317,542	514	341,556	309,836	18,720	13,000
1992/93	13,000	364,183	275	377,458	312,875	16,583	48,000
1993/94	48,000	297,512	250	345,762	300,000	10,762	35,000
Italy							
1990/91	46,600	72,000	11,300	129,900	41,200	51,000	37,700
1991/92	37,700	81,000	11,400	130,100	44,000	51,000	35,100
1992/93	35,100	98,000	9,000	142,100	40,000	48,000	54,100
1993/94	54,100	70,000	8,000	132,100	44,000	45,000	43,100
Spain							
1990/91	18,203	65,000	8,912	92,115	8,301	77,000	6,814
1991/92	6,814	91,400	6,713	104,927	9,758	79,169	16,000
1992/93	16,000	131,500	1,800	149,300	20,900	93,400	35,000
1993/94	35,000	93,400	2,000	130,400	25,000	93,400	12,000
Total EC							
1990/91	104,103	423,176	52,316	579,595	299,968	206,313	73,314
1991/92	73,314	521,342	46,427	641,083	367,394	206,589	67,100
1992/93	67,100	625,883	35,575	728,558	377,775	217,800	141,500
1993/94	141,500	488,612	32,250	662,362	374,000	197,262	91,100
Argentina							
1990/91	1,149	31,000	4,000	36,149	1,889	34,111	149
1991/92	149	49,000	8,622	57,771	7,761	48,370	1,640
1992/93	1,640	31,000	16,400	49,040	900	46,590	1,550
1993/94	1,550	50,000	9,000	60,550	9,000	49,000	2,550
Australia							
1990/91	9,492	30,000	3,583	43,075	19,770	18,900	4,405
1991/92	4,405	31,600	2,545	38,550	13,619	18,900	6,031
1992/93	6,031	34,600	319	40,950	12,700	18,500	9,750
1993/94	9,750	32,000	500	42,250	15,000	18,500	8,750
Chile							
1990/91	950	24,000	0	24,950	17,000	7,600	350
1991/92	350	31,000	0	31,350	20,200	10,000	1,150
1992/93	1,150	34,200	0	35,350	24,543	10,500	307
1993/94	307	34,500	0	34,807	23,500	11,100	207
Japan							
1990/91	6,000	20,927	42,189	69,116	10	66,106	3,000
1991/92	3,000	22,208	53,569	78,777	5	68,772	10,000
1992/93	10,000	19,148	45,428	74,576	3	64,573	10,000
1993/94	10,000	14,000	54,000	78,000	5	69,995	8,000
South Africa							
1990/91	29,722	65,815	0	95,537	56,679	11,650	27,208
1991/92	27,208	65,557	0	92,765	50,840	11,857	30,068
1992/93	33,538	74,619	0	108,157	52,224	11,875	44,058
1993/94	44,058	58,000	0	102,058	55,000	12,058	35,000
Total							
1990/91	151,416	594,918	102,088	848,422	395,316	344,680	108,426
1991/92	108,426	720,707	111,163	940,296	459,819	364,488	119,459
1992/93	119,459	819,450	97,722	1,036,631	468,145	369,838	207,165
1993/94	207,165	677,112	95,750	980,027	476,505	357,915	145,607

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans
2/ The 1993/94 marketing year includes 1993 packs in the Northern Hemisphere and early 1994 packs in the Southern Hemisphere.

Canned Pears: Production, Supply, and Distribution
(Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
France							
1990/91	6,900	24,500	20,800	52,200	1,400	43,400	7,400
1991/92	7,400	18,400	25,800	51,600	1,500	46,200	3,900
1992/93	3,900	28,500	17,700	50,100	900	42,100	7,100
1993/94	7,100	27,200	18,400	52,700	2,200	45,000	5,500
Italy							
1990/91	7,360	53,000	2,470	62,830	32,760	15,500	14,570
1991/92	14,570	34,000	2,480	51,050	29,700	15,000	6,350
1992/93	6,350	76,000	1,000	83,350	33,000	15,000	35,350
1993/94	35,350	50,000	1,000	86,350	36,000	15,000	35,350
Spain							
1990/91	0	11,800	309	12,109	5,758	6,351	0
1991/92	0	8,800	343	9,143	4,443	4,700	0
1992/93	0	16,200	1,000	17,200	6,400	5,800	5,000
1993/94	5,000	14,200	500	19,700	8,000	6,000	5,700
Total EC							
1990/91	14,260	89,300	23,579	127,139	39,918	65,251	21,970
1991/92	21,970	61,200	28,623	111,793	35,643	65,900	10,250
1992/93	10,250	120,700	19,700	150,650	40,300	62,900	47,450
1993/94	47,450	91,400	19,900	158,750	46,200	66,000	46,550
Australia							
1990/91	16,946	42,000	580	59,526	41,466	6,000	12,060
1991/92	12,060	55,000	858	67,918	41,709	7,000	19,209
1992/93	19,209	44,900	63	64,172	51,356	9,000	3,816
1993/94	3,816	41,000	500	45,316	39,000	6,000	316
Japan							
1990/91	600	556	6,948	8,104	19	7,385	700
1991/92	700	571	7,411	8,682	10	7,872	800
1992/93	800	585	6,763	8,148	14	7,634	500
1993/94	500	580	7,600	8,680	10	8,170	500
South Africa							
1990/91	7,292	27,668	0	34,960	25,104	2,876	6,980
1991/92	6,980	20,798	0	27,778	23,786	2,902	1,090
1992/93	1,090	25,635	0	26,725	20,306	2,879	3,540
1993/94	3,540	20,600	0	24,140	20,000	2,900	1,240
Total							
1990/91	39,098	159,524	31,107	229,729	106,507	81,512	41,710
1991/92	41,710	137,569	36,892	216,171	101,148	83,674	31,349
1992/93	31,349	191,820	26,526	249,695	111,976	82,413	55,306
1993/94	55,306	153,580	28,000	236,886	105,210	83,070	48,606

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans
2/ The 1993/94 marketing year includes 1993 packs in the Northern Hemisphere and early 1994 packs in the Southern Hemisphere.
Note: Data for the United States are no longer available.

Canned Fruit Mixtures: Production, Supply, and Distribution
(Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumptn.	Ending Stocks
France							
1990/91	10,300	24,900	31,400	66,600	5,000	50,400	11,200
1991/92	11,200	23,000	27,900	62,100	5,900	47,400	8,800
1992/93	8,800	24,400	31,400	64,600	7,100	45,300	12,200
1993/94	12,200	22,500	29,200	63,900	9,500	45,500	8,900
Greece							
1990/91	503	22,618	29	23,150	20,748	1,500	902
1991/92	902	26,930	151	27,983	25,793	1,400	790
1992/93	790	22,440	328	23,558	19,306	1,300	2,952
1993/94	2,952	11,220	250	14,422	11,000	1,300	2,122
Italy							
1990/91	15,200	72,000	1,060	88,260	62,620	25,640	0
1991/92	0	75,000	1,500	76,500	58,000	18,500	0
1992/93	0	78,000	1,300	79,300	62,500	16,800	0
1993/94	0	76,000	1,500	77,500	61,500	16,000	
Total EC							
1990/91	26,003	119,518	32,489	178,010	88,368	77,540	12,102
1991/92	12,102	124,930	29,551	166,583	89,693	67,300	9,590
1992/93	9,590	124,840	33,028	167,458	88,906	63,400	15,152
1993/94	15,152	109,720	30,950	155,822	82,000	62,800	11,022
Argentina							
1990/91	na	na	na	na	na	na	585
1991/92	585	7,000	242	7,927	135	6,692	1,000
1992/93	1,000	5,500	850	7,350	40	6,710	600
1993/94	600	8,000	400	9,000	500	7,500	1,000
Australia							
1990/91	1,769	30,400	0	32,169	21,035	10,900	234
1991/92	234	34,100	0	34,334	22,014	12,000	320
1992/93	320	32,200	0	32,520	17,102	13,700	1,718
1993/94	1,718	31,500	0	33,218	19,000	12,000	2,218
Chile							
1990/91	50	3,100	0	3,150	2,800	300	50
1991/92	50	2,650	0	2,700	2,350	310	40
1992/93	40	4,150	0	4,190	3,865	310	15
1993/94	15	4,050	0	4,065	3,700	320	45
Japan							
1990/91	1,000	4,173	10,197	15,370	0	13,870	1,500
1991/92	1,500	3,370	11,098	15,968	0	13,968	2,000
1992/93	2,000	3,023	9,390	14,413	2	13,411	1,000
1993/94	1,000	3,500	11,200	15,700	0	14,700	1,000
South Africa							
1990/91	5,377	42,378	0	47,755	37,229	4,961	5,565
1991/92	5,565	50,372	0	55,937	34,085	4,954	16,898
1992/93	16,898	48,494	0	65,392	42,870	4,970	17,552
1993/94	17,552	42,120	0	59,672	40,000	4,975	14,697
Total							
1990/91	34,199	199,569	42,686	276,454	149,432	107,571	20,036
1991/92	20,036	222,422	40,891	283,349	148,277	105,224	29,848
1992/93	29,848	218,207	43,268	291,323	152,785	102,501	36,037
1993/94	36,037	198,890	42,550	277,477	145,200	102,295	29,982

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans
2/ The 1993/94 marketing year includes 1993 packs in the Northern Hemisphere and early 1994 packs in the Southern Hemisphere.
Note: Data for the United States are no longer available.

Canned Apricots: Production, Supply, and Distribution
(Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
Australia							
1990/91	4,007	8,700	905	13,612	2,645	7,200	3,767
1991/92	3,767	9,800	1,255	14,822	1,860	7,000	5,962
1992/93	5,962	12,000	710	18,672	1,938	8,600	8,134
1993/94	8,134	8,095	700	16,929	2,000	9,000	5,929
Greece							
1990/91	308	47,352	109	47,770	38,224	1,200	8,346
1991/92	8,346	36,730	22	45,098	43,091	1,100	907
1992/93	907	45,782	210	46,899	38,015	1,200	7,684
1993/94	7,684	24,331	200	32,215	25,000	1,200	6,015
South Africa							
1990/91	2,675	16,720	0	19,395	15,900	745	2,750
1991/92	2,750	24,308	0	27,058	16,782	758	9,518
1992/93	9,518	24,247	0	33,765	19,467	765	13,533
1993/94	13,533	22,320	0	35,853	22,000	773	13,080
Spain							
1990/91	13,076	12,000	75	25,151	8,196	5,500	11,455
1991/92	11,455	28,595	208	40,258	29,294	5,464	5,500
1992/93	5,500	17,700	100	23,300	18,300	5,000	0
1993/94	0	16,000	100	16,100	11,000	5,100	0
Total							
1990/91	20,066	84,772	1,089	105,928	64,965	14,645	26,318
1991/92	26,318	99,433	1,485	127,236	91,027	14,322	21,887
1992/93	21,887	99,729	1,020	122,636	77,720	15,565	29,351
1993/94	29,351	70,746	1,000	101,097	60,000	16,073	25,024

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans.

2/ The 1993/94 marketing year includes 1993 packs in the Northern Hemisphere and early 1994 packs in the Southern Hemisphere.

Note: Data for the United States are no longer available.

STRAWBERRY TRADE SITUATION IN SELECTED COUNTRIES

Strawberry production and consumption in selected countries continue to grow, led by the United States. United States strawberry production has been climbing steadily for two decades, reaching 646,000 metric tons in 1993, meeting consumer demand for year-round availability. U.S. strawberry consumption has doubled since the early 1970's, and among U.S.-grown fresh fruits, is now second only to apples in farm value. U.S. exports of fresh and frozen strawberries have been growing, and are now over 60,000 tons. Canada remains the major destination for U.S. fresh strawberry exports, accounting for 77 percent of 1993 exports. Mexico's removal of the 20 percent import tariff for imports of U.S. strawberries will likely lower strawberry prices in Mexico during the summer and fall months, providing a significant market for U.S. fresh strawberries in Mexico. Japan continues to receive the largest share of U.S. frozen strawberry exports, about 65 percent, compared to Canada's 21 percent.

U.S. Position in a Competitive World Market

The U.S. strawberry industry faces strong competition from a number of producing countries around the world, including several of the countries profiled in this feature. The primary competitors in the European market are Spain, Italy, France and Poland. Other competitors are countries in Africa and Central America, and Israel. These countries are now supplying European markets in the off-season.

Thailand's increasing prominence in strawberry production is directly related to the financial support its growers are receiving from Japan. With this assistance, Thailand is aggressively developing its industry and is quickly becoming a formidable force in the marketplace.

The California Strawberry Commission (CSC) has received Market Promotion Program (MPP) funds since 1990. These funds have been instrumental in expanding markets in Japan, Mexico and Canada. For example, while frozen strawberries are traditionally sold to jam, ice cream, and yogurt manufacturers, the CSC has encouraged the use of U.S. frozen strawberries in restaurants, bars, coffee shops, and other food service sectors, with the introduction of new beverage and dessert products.

In Canada, Japan, and Mexico, retail promotions for fresh strawberries focus on the fact that California strawberries are available in the off-season. While consumers and the trade are knowledgeable about strawberries they are unaware of the availability of strawberries in the off-season.

United States

U.S. fresh strawberry consumption has doubled since the early 1970's, and among U.S.-grown fresh fruits, strawberries are now second only to apples in value. U.S. strawberry production has been climbing steadily for two decades, meeting consumer demand for year-round availability. About 70 percent of the U.S. crop was marketed fresh in 1993/94.

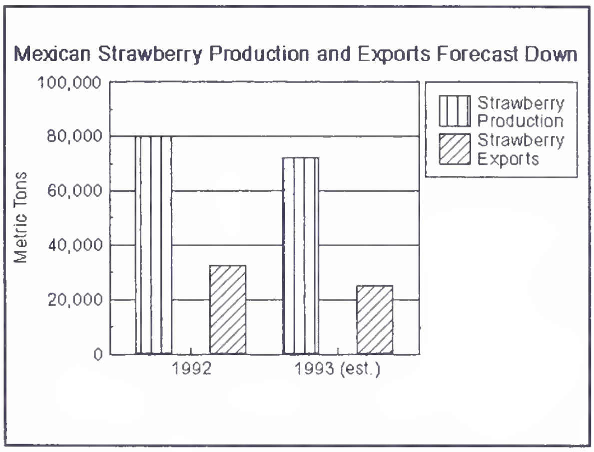
The 1993/94 U.S. strawberry crop is estimated at a record 646,000 metric tons worth nearly $750 million to growers. Output in California was up 10 percent from 1992/93, while Florida, Oregon, and other smaller producers showed a relatively small change from the previous year. California accounted for a production share of nearly 80 percent, from about 60 percent 20 years earlier. Florida's

share rose from 4 to 10 percent, while Oregon's declined from 14 to 5 percent. The outlook for the 1994/95 strawberry crop is favorable with the Florida crop expected to be substantially up and California's crop expected to remain about the same.

With the increase in domestic supplies, Americans are now eating more strawberries grown in the U.S. and fewer that are grown elsewhere. U.S. output of strawberries nearly tripled between 1970-72 and 1990-92, while imports declined from 13 to 3 percent of the U.S. fresh strawberry supply. Strawberry imports were 34,000 tons in 1993, 14,000 tons fresh and 20,000 tons frozen, with Mexico accounting for 92 percent of the total.

United States: Imports and Exports of Strawberries
(Metric Tons)

	1990	1991	1992	1993
Imports Fresh				
Mexico	12,601	13,041	9,238	12,747
Other	1,997	1,225	1,559	1,480
Total	14,598	14,266	10,797	14,227
Imports Frozen				
Mexico	18,550	21,053	18,258	18,359
Other	3,424	1,291	1,513	1,148
Total	21,974	22,344	19,771	19,507
Exports Fresh				
Canada	33,209	36,185	35,539	35,611
Japan	3,520	3,808	3,578	3,967
Mexico	211	351	2,221	3,583
United Kingdom	604	822	2,499	1,668
Other	1,343	2,023	2,549	1,464
Total	38,887	43,189	46,386	46,293
Exports Frozen				
Australia	482	790	1,556	1,409
Canada	2,241	2,836	2,776	3,915
Japan	11,770	7,398	8,277	11,955
Other	375	815	1,005	1,055
Total	14,868	11,839	13,614	18,334



At the same time, U.S. exports of strawberries increased from 3 to 11 percent of total U.S. supply. Canada and Japan are the main destinations for U.S. exports of fresh and frozen strawberries. The United States exported 46,000 tons of fresh market strawberries in 1993, the same as the previous year. Exports of frozen strawberries rose 35 percent, to 18,000 tons. Canada remained the major destination for U.S. fresh strawberries, accounting for 77 percent of the 1993 total. Japan continued to receive the largest share of U.S. frozen strawberry exports, about 65 percent, compared to Canada's 21 percent.

The United States also exports small quantities of fresh strawberries to Mexico during the summer and late fall, before Mexico's crop is available. The elimination of Mexico's tariff on fresh U.S. strawberries early this year - a provision of the North American Free Trade Agreement (NAFTA) - could increase demand in the Mexican market. While the elimination of Mexico's fairly steep tariff on fresh U.S. strawberries should bring their price down substantially in the Mexican market, elimination of the small U.S. tariff will have little effect on the attractiveness of fresh Mexican strawberries in the U.S. market.

Mexico

In MY 1993/94 (August/July) Mexican strawberry production is forecast at 72,000 metric tons compared to 80,000 MT in MY 1992/93. This 10 percent decrease is a result of less acreage devoted to strawberry planting in Mexico because of lack of credit and low prices. The quality of strawberries for MY 1993/94 is considered good.

Many varieties of strawberries are grown in Mexico, depending upon climate and use. Over ninety percent of the strawberries produced in Mexico are grown in the states of Michoacan, Guanajuato, and Baja California. Total strawberry area for MY 1993/94 is estimated at 3,400 hectares, a decrease of 8 percent from MY 1992/93. After the initial expansion in area following the liberalization of strawberry planting in 1988, area has slowly fallen throughout Mexico. Since 1992, this contraction in area has occurred as a result of lower than expected prices, weather problems, and the resulting poor financial status of producers. For MY 1993/94, many growers in Michoacan that previously grew strawberries are producing potatoes, tomatoes and onions. The switch to these crops occurred because of the low prices for strawberries, higher production costs and the lack of credit.

Mexican processed strawberry production is forecast to decrease from 35,000 metric tons in MY 1992/93 (Aug/July) to 28,000 metric tons in MY 1993/94. This decrease is a result of less acreage devoted to strawberries and more favorable prices for the fresh market which is drawing supplies from the frozen market. The farmgate price for strawberries destined for processing is about 17 percent less than for strawberries destined for the fresh market. Several strawberry processing plants have closed recently due to a lack of fruit and credit.

Lower export demand for strawberries is expected to result in an increase of 9 percent over MY 1992/93 for the consumption of fresh strawberries. For processed strawberries, however, It is estimated that consumption will decrease from 16,000 MT in MY 1992/93 to 13,000 MT for MY 1993/94, or about 18 percent.

Strawberries from the United States are imported by Mexico when domestic production is not sufficient to cover demand. Imports of fresh strawberries from the United States supply the Mexican market from July through November. These periods are likely to expand if the decrease in domestic production continues. While the price is considerably more than domestic strawberries, consumers appreciate the availability of high-quality U.S. strawberries. According to the United States Bureau of Census data, for calendar year 1992 the United States exported 2,221 metric tons of fresh strawberries, and for CY 1993 the United States exported 3,583 metric tons, an increase of 61 percent over CY 1992 exports. This growth should continue in the future.

Mexico exported 13,700 metric tons, mostly to the United States, for MY 1992/93 as prices in the United States were high during the first quarter of 1993. Mexican exports are forecast to decrease for MY 1993/94 because of decreased area planted and unfavorable export prices. The majority of Mexican strawberry exports occur from December to April or May.

Currently there are no non-tariff trade barriers in Mexico to the import of fresh strawberries from the United States. Mexico's removal of the 20 percent import tariff for U.S. strawberry imports will likely lower strawberry prices in Mexico during the summer and fall months, providing a significant market for U.S. fresh strawberries in Mexico. Imports into Mexico from non-NAFTA countries are charged a 20

percent import tax. Mexican strawberry exports to the United States are also no longer subject to a duty.

For frozen strawberries, under the NAFTA, Mexico dropped the 20 percent import duty to 14 percent for the United States and will reduce it to zero in equal installments over 10 years. Imports from non-NAFTA countries are still charged a 20 percent import tax. For 1994, the import tax for frozen strawberries from the United States is 12.6 percent. The 14 percent U.S. duty on imports of frozen strawberries from Mexico will also be phased out over 10 years. For 1994, the import tax on frozen strawberries from Mexico is 12.6 percent. The initial reduction of the Mexican tariff on U.S. frozen strawberries should give an immediate boost to exports from the United States. However, over the term of the tariff phase-out strawberries from the United States and Mexico will be competing with each other for markets in both countries.

Chile

Chilean strawberry output is estimated to increase 14 percent to 16,000 tons in 1993/94 based on an increase in planted area and favorable growing conditions. Variations in yearly planted area and production, based largely on price expectations and availability of nursery stock, make production forecasts difficult. Unstable climatic conditions in many production areas compound the difficulty. Although strengthened export prices helped spur increased output during the last two years, industry sources foresee stagnant planted area and production for the next three to five years as a result of limited availability of nursery stock. Erratic planting decisions by producers have forced all but one of the strawberry nurseries into bankruptcy in recent years.

Chile's main fresh strawberry export market is the European Union, where Spain is Chile's main competitor. Chile's far larger frozen strawberry export markets are mainly in Latin America and Japan. Exports of frozen strawberries are forecast to grow almost 20 percent in 1993/94 to 2,930 tons. Exports of frozen strawberries are expected to grow slowly in the coming years depending upon foreign demand.

Currently, Chile restricts imports of fresh strawberries based on phytosanitary concerns. USDA and the Chilean Ministry of Agriculture are currently addressing these restrictions with the hope of securing access for fresh strawberries. For frozen strawberries, transportation costs, customs duties, and competition from domestic production would probably severely limit import potential.

Poland

In 1989/90, Poland was the second largest producer of strawberries after the United States. Strawberries are the second most valuable fruit produced in Poland. As a result of ideal weather conditions, Poland produced a record strawberry crop of 334,000 tons in 1986/87. During 1987/88-1990/91, strawberry production ranged between 240,000-270,000 tons. Strawberry production fell to 204,600 tons in 1991/92 and fell again to 200,000 in 1992/93. If weather conditions are favorable, production for 1993/94 is expected to reach 202,000 tons.

Since 1989/90, the profitability of strawberry cultivation has been declining due to relatively sharp increases in production costs. The situation improved slightly in 1992/93 when rapidly increasing prices led to investments in new plantings. These plantings will reach their full productivity level in 1994/95-1995/96 when strawberry production is expected to reach 270,000-300,000 tons.

Senga Sengata is the most popular variety in Poland and is harvested from about 80 percent of the area planted to strawberries. Rich, red color and good taste make it very attractive for the processing sector.

Per capita consumption of fresh strawberries in Poland is estimated at about 2 kilograms per year. Poles prefer Polish origin strawberries because of their sweeter taste and much lower price. Fresh strawberries are consumed mostly during their peak harvest season (June-July), which is also the time when home-made stocks of frozen and processed strawberries are prepared for the rest of the year. Consumption of commercially frozen or processed

strawberries is minimal due to the prevalence of home processing. In 1991/92, about 120,000 tons of strawberries were processed commercially out of the total production of 204,600 tons. An estimated 118,000 tons out of 200,000 tons were processed in 1992/93. The processing sector is forecast to utilize about 119,000 tons in 1993/94 out of a forecast production of 202,000 tons.

In 1991/92, 103,000 tons of processed and frozen strawberries were exported. Most of these exports (67 percent) were frozen strawberries. As a result of the lower total strawberry production caused by drought, exports in 1992/93 fell to 88,000 tons. It is forecast that exports in 1993/94 will increase 10 percent to 95,000 tons.

Japan

Japan's area planted to strawberries is in a steady, long-term decline along with the general contraction of Japanese agriculture. Strawberry production for 1993/94 is forecast at 200,700 tons, down from 209,000 tons last year. Japan's frozen strawberry production is minor, approximately 700 tons per year. Approximately 78 percent of Japanese strawberry production (in acreage terms) takes place in hot houses, while another 17 percent is produced in "tunnels", leaving only 5 percent of output produced in the open air.

Japan's frozen strawberry consumption for MY 1993/94 is estimated at 27,700 tons, an increase of 5,280 tons or 23 percent over last year. Frozen strawberries are mainly consumed in the food processing sector, primarily for the production of jam, but also in the bakery, confectionery, ice cream, yogurt and frozen desert industries.

Japan is the United States' largest market for frozen strawberries. The U.S. market share has grown from 33 percent in 1988 to approximately 58 percent in 1993. However, it faces competition from lower-cost suppliers, such as Thailand and China. Over 97 percent of Japan's frozen strawberry needs are imported, with the U.S. alone supplying over 50 percent (over 12,000 tons in 1993) of Japan's total consumption. Imports from the United States increased 14 percent in 1993 over 1992.

Although Japanese imports of fresh strawberries are less than 2 percent of the total domestic consumption, the U.S. is by far the largest foreign supplier of fresh strawberries to Japan, with an import market share of about 97 percent. Imports of fresh strawberries from all sources have risen continuously, more than doubling since 1985. Imports of U.S. fresh strawberries increased by 17 percent in 1993 to 3,847 tons. This trend will continue in 1994, due to the shortfall in domestic fresh production. Industry sources forecast that, in the future, imports from the U.S. will continue to increase. Though consumers commonly prefer Japanese strawberries due to the perception that domestic berries are sweeter, more consistent in size and shape, and with fewer cosmetic defects, this last problem owes much to the Japanese government's practice of requiring fumigation of virtually all imports of fresh produce.

Canada

Strawberries are an important horticultural crop in Canada, ranking third in value behind apples and blueberries. Total fresh strawberry production, now at 29,000 tons, has shown no growth over the past ten years. However, cultivated area increased sharply in the past 3 years and the outlook is for increased production in the next 3 to 5 years.

Canadian consumption of fresh strawberries has shown steady growth over the last decade, averaging an annual increase of more than 3 percent per year. Virtually all growth in the consumption is attributable to increased imports. Total imports of fresh strawberries reached 36,400 tons in 1992/93, valued at $C56.6 million. Almost all imports were from the United States. The outlook for the mid-term is for annual increases in imports in the range of 2-3 percent. Canadian exports of fresh strawberries are insignificant.

The annual output of frozen strawberries, now at 4,200 tons, is down from levels realized throughout the 1980's. In the mid-term, any increase in strawberry production is more likely to be targeted to the fresh market. Consequently, frozen strawberry output in

1993/94 is forecast to be unchanged to slightly lower.

Consumption of frozen strawberries in the last 10 years has not matched increases attributable to fresh strawberries. This development reflects the downward trend in the domestic production of frozen strawberries in Canada. In the future, imports are expected to capture an increased share of total consumption.

Mexico and the United States rank one and two as important suppliers of frozen strawberries to Canada. During 1992/93, Canada's total frozen strawberry imports reached 9,385 tons, with Mexico accounting for 43 percent of the total and the United States, 30 percent. The U.S. share of the market is expected to grow in future years as tariff reductions under the U.S./Canada Free Trade Agreement increase U.S. competitiveness against imports from Mexico.

(For further information on supply, distribution, and trade, contact Craig Jenkins, 202-720-6086. For information on production, contact Kelly Kirby at 202-720-6791.)

Production, Supply, and Distribution of Strawberries for Selected Countries (Metric Tons)

	1991/92	1992/93	1993/94
Canada			
Fresh			
Production	24,940	29,403	29,200
Imports	37,998	36,400	38,000
Total Supply	62,938	65,803	67,200
Exports	36	31	23
For Processing	6,698	8,100	7,900
Consumption	56,204	57,672	59,277
Total Distribution	62,938	65,803	67,200
Frozen			
Beginning Stocks	1,620	1,700	2,100
Production	2,780	4,240	3,800
Imports	8,355	9,385	9,407
Total Supply	12,755	15,325	15,307
Exports	50	68	59
Consumption	11,005	13,157	13,348
Ending Stocks	1,700	2,100	1,900
Total Distribution	12,755	15,325	15,307

	1991/92	1992/93	1993/94
Chile			
Fresh			
Production	11,000	14,000	16,000
Imports	0	0	0
Total Supply	11,000	14,000	16,000
Exports	22	10	10
For Processing	3,278	3,840	3,990
Consumption	7,700	10,150	12,000
Total Distribution	11,000	14,000	16,000
Frozen			
Beginning Stocks	50	62	73
Production	3,278	3,840	3,990
Imports	0	0	0
Total Supply	3,328	3,902	4,063
Exports	1,946	2,464	2,930
Consumption	1,320	1,365	1,073
Ending Stocks	62	73	60
Total Distribution	3,328	3,902	4,063

	1991/92	1992/93	1993/94
Japan			
Fresh			
Production	208,600	209,000	200,700
Imports	3,703	3,549	7,000
Total Supply	212,303	212,549	207,700
Exports	4	3	1
For Processing	6,140	6,080	5,400
Consumption	206,159	206,466	202,299
Total Distribution	212,303	212,549	207,700
Frozen			
Beginning Stocks	0	0	0
Production	790	750	700
Imports	19,794	21,670	27,000
Total Supply	20,584	22,420	27,700
Exports	0	0	0
Consumption	20,584	22,420	27,700
Ending Stocks	0	0	0
Total Distribution	20,584	22,420	27,700

	1991/92	1992/93	1993/94
Mexico			
Fresh			
Production	70,000	80,000	72,000
Imports	0	0	0
Total Supply	70,000	80,000	72,000
Exports	9,500	13,700	10,000
For Processing	38,500	35,000	28,000
Consumption	22,000	31,300	34,000
Total Distribution	70,000	80,000	72,000
Frozen			
Beginning Stocks	0	0	0
Production	38,500	35,000	28,000
Imports	0	0	0
Total Supply	38,500	35,000	28,000
Exports	20,500	19,000	15,000
Consumption	18,000	16,000	13,000
Ending Stocks	0	0	0
Total Distribution	38,500	35,000	28,000

	1991/92	1992/93	1993/94
Poland			
Fresh			
Production	204,600	200,000	202,000
Imports	0	0	0
Total Supply	204,600	200,000	202,000
Exports	23,600	21,000	22,000
For Processing	120,000	118,000	119,000
Consumption	61,000	61,000	61,000
Total Distribution	204,600	200,000	202,000
Frozen			
Beginning Stocks	0	0	0
Production	110,000	95,000	102,000
Imports	255	255	255
Total Supply	110,255	95,255	102,255
Exports	103,000	88,000	95,000
Consumption	7,255	7,255	7,255
Ending Stocks	0	0	0
Total Distribution	110,255	95,255	102,255

	1991/92	1992/93	1993/94
United States			
Fresh			
Production	621,000	597,000	646,000
Imports	14,000	11,000	14,000
Total Supply	635,000	608,000	660,000
Exports	43,000	46,000	43,000
For Processing	180,000	153,000	201,000
Consumption	412,000	409,000	416,000
Total Distribution	635,000	608,000	660,000
Frozen			
Beginning Stocks	90,000	100,000	79,000
Production	150,000	122,000	192,000
Imports	22,000	20,000	20,000
Total Supply	262,000	242,000	291,000
Exports	12,000	14,000	18,000
Consumption	150,000	149,000	176,000
Ending Stocks	100,000	79,000	97,000
Total Distribution	262,000	242,000	291,000

TOTALS	1991/92	1992/93	1993/94
Fresh			
Production	1,140,140	1,129,403	1,165,900
Imports	55,701	50,949	59,000
Total Supply	1,195,841	1,180,352	1,224,900
Exports	76,162	80,744	75,034
For Processing	354,616	324,020	365,290
Consumption	765,063	775,588	784,576
Total Distribution	1,195,841	1,180,352	1,224,900
Frozen			
Beginning Stocks	91,670	101,762	81,173
Production	305,348	260,830	330,490
Imports	50,404	51,310	56,662
Total Supply	447,422	413,902	468,325
Exports	137,496	123,532	130,989
Consumption	208,164	209,197	238,376
Ending Stocks	101,762	81,173	98,960
Total Distribution	447,422	413,902	468,325

Source: U.S. Census Bureau data

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
FEB 94

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY: CURR MO LAST YR	QUANTITY: CURR MO CURR YR	QUANTITY: YR TDT LAST YR	QUANTITY: YR TDT CURR YR	QUANTITY: LAST YEAR	VALUE (1,000 DOLLARS): CURR MO LAST YR	VALUE (1,000 DOLLARS): CURR MO CURR YR	VALUE (1,000 DOLLARS): YR TDT LAST YR	VALUE (1,000 DOLLARS): YR TDT CURR YR	VALUE (1,000 DOLLARS): LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
TAIWAN		3,908	8,861	95,357	81,101	113,733	2,062	6,660	66,410	64,032	75,230
MEXICO		9,627	20,177	42,558	69,556	99,364	4,812	11,450	20,741	39,457	49,551
CANADA		7,847	7,171	55,011	52,016	83,089	4,721	5,503	37,683	39,042	55,313
HONG KONG		4,420	4,502	32,492	38,765	47,234	2,316	2,464	18,672	22,196	27,786
OTHER		12,347	11,854	122,043	162,951	145,925	7,960	6,933	77,964	88,716	92,820
Subtotal:-----		38,148	52,565	347,460	404,390	489,346	21,871	33,009	221,470	253,444	300,700
FR. PEARS(JUL)	MT										
CANADA		2,255	2,279	28,960	30,600	34,899	1,749	1,520	20,334	20,392	25,100
MEXICO		3,302	5,765	23,138	31,286	34,222	1,669	2,717	11,283	15,935	17,370
TAIWAN		448	807	3,791	3,565	6,157	317	468	2,619	2,159	4,145
SWEDEN		18	18	5,596	6,214	5,790	7	7	2,566	2,232	2,657
OTHER		1,294	834	17,483	19,966	19,289	991	474	10,522	11,050	11,673
Subtotal:-----		7,316	9,704	78,968	91,630	100,358	4,734	5,187	47,324	51,768	60,944
APRICOTS(MAY)	MT										
CANADA		6	8	3,080	3,030	3,091	9	11	3,490	4,043	3,508
MEXICO		8	0	487	1,515	497	16	0	386	1,183	394
EU		1	7	464	317	464	4	6	1,263	955	1,263
UNITED KINGDOM		1	0	426	224	426	4	0	1,118	748	1,118
OTHER		1	17	426	322	440	5	13	599	467	630
Subtotal:-----		16	32	4,457	5,184	4,492	33	31	5,739	6,647	5,794
FR CHERRIES(MAY)	MT										
JAPAN		0	0	12,144	12,467	12,162	0	0	61,981	77,333	61,991
CANADA		22	0	9,600	6,235	9,607	47	0	18,087	13,376	18,106
EU		0	1	3,246	1,902	3,521	0	5	10,988	6,910	11,520
UNITED KINGDOM		0	1	2,634	1,241	2,634	0	5	8,726	4,592	8,726
HONG KONG		0	14	2,553	1,847	2,553	0	32	5,643	5,550	5,643
TAIWAN		0	0	2,081	2,140	2,082	0	0	4,209	4,705	4,211
OTHER		0	0	1,059	782	1,073	0	0	3,339	2,615	3,381
Subtotal:-----		22	16	30,682	25,372	30,998	47	37	104,246	110,489	104,852
PEACH-NECTRN(MAY)	MT										
CANADA		431	687	51,034	48,049	51,461	598	670	43,547	44,740	44,175
MEXICO		23	0	8,946	6,190	8,975	28	0	4,831	3,361	4,857
TAIWAN		0	0	5,476	4,194	5,476	0	0	5,178	4,269	5,178
OTHER		10	23	3,655	4,430	3,773	11	29	3,315	3,877	3,400
Subtotal:-----		464	710	69,112	62,864	69,686	636	699	56,872	56,248	57,610
PLUM-PRUNES(MAY)	MT										
CANADA		220	314	25,127	22,998	25,485	293	345	20,256	22,993	20,756
TAIWAN		0	0	21,848	13,733	21,848	0	0	15,071	12,198	15,071
HONG KONG		0	0	8,470	7,995	8,470	0	0	6,609	6,825	6,609
EU		31	0	5,771	2,176	5,771	69	0	4,574	2,122	4,574
UNITED KINGDOM		0	0	5,154	2,089	5,154	0	0	4,172	1,973	4,172
OTHER		12	0	5,998	7,468	6,115	25	0	4,757	5,657	4,845
Subtotal:-----		263	314	67,215	54,369	67,689	388	345	51,268	49,795	51,855
FR AVOCADOS(OCT)	MT										
EU		160	156	214	991	5,269	153	127	260	876	5,644
CANADA		267	91	857	748	5,165	241	101	878	873	4,492
JAPAN		305	148	485	624	3,234	363	153	696	565	3,387
FRANCE		76	51	76	409	2,832	35	46	35	333	2,734
UNITED KINGDOM		84	51	138	313	1,854	118	40	225	277	2,086
OTHER		2	10	4	38	517	7	35	10	75	701
Subtotal:-----		734	405	1,560	2,402	14,186	764	417	1,844	2,389	14,224
FR KIWIFRUIT(OCT)	MT										
TAIWAN		673	300	1,231	836	3,554	1,191	513	2,052	1,462	5,702
CANADA		478	518	1,660	2,142	3,387	589	616	2,152	2,563	4,298
KOREA, REPUBLIC		110	361	210	980	538	170	656	313	1,802	798
OTHER		141	369	412	973	880	185	461	497	1,301	1,274
Subtotal:-----		1,402	1,548	3,514	4,931	8,359	2,135	2,246	5,014	7,128	12,071
FRESH GRAPES (MAY)	MT										
CANADA		973	656	102,201	108,849	104,410	1,487	891	100,992	119,762	103,958
HONG KONG		0	0	19,431	18,018	19,431	0	0	21,566	20,938	21,566
TAIWAN		0	40	14,944	13,310	14,944	0	35	16,199	17,218	16,199
OTHER		182	551	48,244	62,770	48,367	189	561	62,235	76,733	62,401
Subtotal:-----		1,155	1,248	184,820	202,947	187,152	1,676	1,487	200,992	234,650	204,124
FR STRAWBRIS(JAN)	MT										
CANADA		906	1,385	1,691	2,376	35,611	1,900	2,684	3,482	4,689	49,034
JAPAN		17	0	17	0	3,967	30	0	30	0	20,768
MEXICO		59	156	59	166	3,583	13	34	13	42	1,722
EU		67	123	151	273	2,319	197	288	460	693	4,977
OTHER		29	79	50	152	813	110	302	183	584	2,745
Subtotal:-----		1,077	1,743	1,967	2,966	46,293	2,250	3,308	4,169	6,007	79,245
FR ORNG INC TMPL(NOV)	MT										
CANADA		26,472	24,402	85,269	81,242	206,881	12,493	11,560	42,210	41,880	100,853
JAPAN		9,677	13,167	26,882	35,291	161,786	4,456	6,993	12,997	20,666	87,734
HONG KONG		10,253	6,551	34,698	27,000	128,569	5,275	3,212	16,841	14,433	61,277
OTHER		6,794	6,662	15,111	16,549	59,112	3,380	3,576	7,744	9,236	29,713
Subtotal:-----		53,196	50,783	161,961	160,083	556,348	25,603	25,341	79,792	86,215	279,578
FR GRPFRT(SEP)	MT										
JAPAN		50,904	41,527	102,854	104,549	222,775	24,058	21,406	53,432	57,207	108,744
EU		23,266	15,095	80,723	72,569	116,865	11,433	7,944	39,646	35,661	61,288
CANADA		6,981	7,969	38,901	43,851	69,444	3,298	2,906	19,647	18,860	34,612
FRANCE		10,091	5,959	36,513	26,870	51,050	4,827	3,161	17,970	14,269	25,344
NETHERLANDS		5,095	3,912	20,910	19,880	29,021	2,126	1,964	9,758	9,397	14,005
OTHER		5,467	5,727	11,253	12,108	31,919	2,540	2,727	5,714	6,163	15,609
Subtotal:-----		86,619	70,318	233,730	233,078	441,003	41,330	34,983	118,439	117,891	220,253
FR TANGERINES(NOV)	MT										
CANADA		1,364	1,893	6,853	7,466	8,616	1,041	1,361	5,905	5,862	7,582
EU		453	205	484	417	648	356	121	382	235	506
OTHER		29	108	87	204	180	33	173	189	233	254
Subtotal:-----		1,845	2,206	7,424	8,088	9,444	1,430	1,654	6,475	6,330	8,342
CANNED FRUIT											
CND PEACH&NECT(JUN)	MT										
JAPAN		560	438	3,796	3,582	5,812	571	571	4,162	4,113	6,391
CANADA		191	366	1,692	2,150	2,691	238	425	2,091	2,516	3,212
TAIWAN		152	179	1,894	1,342	2,460	112	143	1,600	1,164	2,106
MEXICO		53	5	1,300	1,308	1,775	43	5	996	982	1,421
HONG KONG		74	54	1,086	1,264	1,467	56	46	573	1,161	804
OTHER		257	383	3,755	4,744	5,611	292	334	3,526	4,092	5,033
Subtotal:-----		1,287	1,425	13,523	14,389	19,815	1,312	1,523	12,947	14,028	18,967

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
FEB 94

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	QUANTITY CURR MO CURR YR	QUANTITY YR TDT LAST YR	QUANTITY YR TDT CURR YR	QUANTITY LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	VALUE (1,000 DOLLARS) CURR MO CURR YR	VALUE (1,000 DOLLARS) YR TDT LAST YR	VALUE (1,000 DOLLARS) YR TDT CURR YR	VALUE (1,000 DOLLARS) LAST YEAR
CANNED FRUIT											
CND PEARS(JUN)	MT										
CANADA		134	154	1,105	1,097	1,508	135	154	1,141	1,119	1,579
EU		80	25	687	95	709	119	31	862	104	886
JAPAN		64	125	371	330	506	65	144	398	371	555
UNITED KINGDOM		73	0	466	0	466	111	0	662	0	662
MEXICO		42	0	300	148	321	41	0	282	139	310
OTHER		34	82	705	534	861	29	65	608	429	740
Subtotal:-----		353	385	3,167	2,205	3,905	388	394	3,291	2,162	4,071
CND PNEAPL(JAN)	MT										
JAPAN		127	31	208	101	1,371	122	31	199	127	1,300
CANADA		113	133	338	133	1,354	121	121	332	121	1,306
MEXICO		56	24	107	30	786	46	18	88	23	643
EU		0	85	26	85	533	0	72	25	72	476
GERMANY		0	85	0	85	245	0	72	0	72	224
OTHER		66	5	93	24	373	56	7	83	28	253
Subtotal:-----		362	278	771	372	4,417	346	249	726	371	3,977
FRT MIXTURES(JUN)	MT										
CANADA		532	308	4,673	4,561	6,542	724	410	6,367	5,714	8,786
JAPAN		239	485	2,683	4,565	4,708	269	694	3,117	5,539	5,512
HONG KONG		145	224	2,578	2,996	3,753	166	255	1,913	3,160	3,071
PHILIPPINES		86	30	3,177	1,075	3,337	101	33	3,305	1,250	3,489
SAUDI ARABIA		340	230	2,872	1,382	3,096	423	340	2,294	1,722	2,496
SINGAPORE		32	91	2,179	1,989	2,662	57	102	2,301	2,187	2,833
OTHER		760	637	8,525	5,106	10,797	850	715	8,457	6,199	11,198
Subtotal:-----		2,133	2,006	26,687	21,674	34,896	2,589	2,547	27,753	25,772	37,386
DRIED FRUIT											
DRD RAISINS(AUG)	MT										
EU		4,366	3,349	36,058	32,469	56,420	5,637	5,237	47,155	48,580	76,224
UNITED KINGDOM		1,859	1,796	15,875	15,715	25,585	2,667	3,000	21,513	24,310	35,568
JAPAN		1,668	1,695	12,870	14,586	23,290	2,190	2,458	16,705	21,686	31,573
GERMANY		940	775	8,670	8,294	13,256	1,131	1,003	10,977	10,965	17,158
CANADA		536	718	6,798	7,001	10,832	1,139	1,514	14,199	14,925	22,715
DENMARK		405	306	4,799	3,726	7,205	532	428	5,824	5,374	8,998
OTHER		2,010	2,884	25,466	23,648	35,256	3,084	4,504	34,114	37,332	49,675
Subtotal:-----		8,580	8,646	81,192	77,704	125,798	12,050	13,714	112,172	122,523	180,188
DRD PRUNES(AUG)	MT										
EU		4,269	2,397	30,383	18,244	48,625	5,699	6,051	43,077	41,078	69,456
GERMANY		1,876	1,306	9,512	6,818	17,419	2,164	3,104	11,694	15,029	21,920
JAPAN		1,135	548	8,964	8,429	15,311	1,608	1,256	14,285	18,456	25,815
ITALY		1,068	319	8,142	4,268	11,874	1,898	878	14,097	11,128	20,608
UNITED KINGDOM		848	227	4,971	2,304	7,498	977	463	6,062	4,076	9,401
CANADA		399	322	2,901	2,862	5,052	903	790	6,426	6,626	10,820
OTHER		1,486	972	13,743	9,708	18,937	1,926	2,295	19,718	20,444	28,288
Subtotal:-----		7,289	4,239	55,991	39,242	87,925	10,136	10,392	83,506	86,603	134,380
FRUIT JUICES(SSE)											
ORANGE JU CNC (DEC)	KL										
EU		5,866	3,767	14,767	14,783	107,753	2,257	1,520	5,574	6,572	42,269
CANADA		12,303	2,176	30,095	7,216	99,111	5,444	3,537	13,401	11,636	46,741
FRANCE		3,593	2,498	8,384	10,379	42,560	1,353	918	3,285	4,212	18,467
JAPAN		2,912	2,510	6,703	6,271	37,807	1,295	1,718	2,741	4,598	15,138
KOREA, REPUBLIC		1,905	2,724	3,120	4,787	30,421	766	1,493	1,359	3,809	13,872
NETHERLANDS		645	61	858	414	19,427	254	19	344	227	4,744
OTHER		3,609	2,889	11,251	12,499	64,198	1,297	1,227	4,227	4,941	22,064
Subtotal:-----		26,595	14,067	65,937	45,556	339,290	11,059	9,495	27,303	31,556	140,085
ORNG JU NTCNC(DEC)	KL										
CANADA		2,964	5,382	9,182	15,710	47,869	2,470	3,563	7,636	10,579	34,699
EU		1,105	764	4,767	5,852	23,888	631	450	3,457	3,307	15,598
FRANCE		463	364	3,435	1,292	8,423	252	223	2,612	823	5,770
BELGIUM-LUXEMBOU		168	0	176	981	6,262	97	0	104	611	4,278
UNITED KINGDOM		217	372	871	2,422	5,108	166	215	617	1,401	3,071
SWEDEN		590	95	1,145	701	4,763	720	98	1,326	645	5,257
OTHER		1,213	1,271	3,353	3,615	16,194	818	946	2,407	2,846	12,453
Subtotal:-----		5,872	7,512	18,447	25,878	92,714	4,638	5,057	14,827	17,376	68,006
GRPFRT JU CNC (DEC)	KL										
JAPAN		2,801	1,159	6,397	1,960	28,127	1,975	1,868	4,499	2,904	19,417
EU		604	489	2,722	1,866	20,014	240	194	998	875	9,297
NETHERLANDS		90	280	317	308	7,935	71	90	233	135	3,861
CANADA		665	129	1,806	337	7,066	479	220	1,300	559	5,268
FRANCE		195	95	429	671	4,002	83	35	181	283	1,807
UNITED KINGDOM		289	19	1,643	544	3,785	68	22	447	214	1,353
OTHER		55	549	348	866	2,390	19	177	204	396	1,376
Subtotal:-----		4,125	2,327	11,273	5,030	57,597	2,714	2,459	7,002	4,733	35,358
FRESH VEGETABLES											
FR ASPARAGUS(OCT)	MT										
CANADA		590	250	1,239	760	9,868	1,498	813	3,338	2,349	21,592
JAPAN		993	1,166	1,103	1,922	7,498	4,058	5,372	4,281	8,765	29,584
EU		223	161	351	210	1,866	720	591	1,094	779	5,507
SWITZERLAND		160	296	192	358	1,794	477	1,142	577	1,332	4,985
OTHER		10	10	27	15	264	39	30	98	48	846
Subtotal:-----		1,976	1,883	2,913	3,264	21,289	6,792	7,949	9,387	13,272	62,514
FR ONIONS(OCT)	MT										
CANADA		7,801	4,298	38,028	33,789	117,151	3,221	2,644	16,192	16,788	47,955
JAPAN		183	7	2,110	1,844	28,107	62	31	502	480	9,044
MEXICO		772	68	16,976	8,914	21,278	319	27	5,379	2,680	6,759
OTHER		230	288	8,200	6,279	16,469	316	196	4,608	2,915	8,083
Subtotal:-----		8,986	4,661	65,315	50,826	183,006	3,918	2,898	26,681	22,863	71,841
CANNED VEGETABLES											
CND SWT CORN(AUG)	MT										
EU		3,165	3,837	28,434	28,406	55,436	2,243	2,541	20,556	20,365	39,589
JAPAN		3,652	3,606	27,532	36,399	50,125	2,989	2,924	22,066	28,962	39,778
UNITED KINGDOM		770	1,627	12,066	7,571	21,814	502	1,113	8,567	5,282	15,301
GERMANY		1,810	337	8,867	6,872	17,723	1,323	249	6,573	4,920	12,902
TAIWAN		1,152	1,583	10,838	9,073	17,512	897	1,546	9,836	8,077	15,497
HONG KONG		621	1,086	9,795	8,446	15,846	290	884	4,985	6,510	8,313
OTHER		2,118	2,062	17,153	16,992	33,205	1,646	1,545	13,190	13,857	25,641
Subtotal:-----		10,708	12,174	93,752	99,315	172,124	8,065	9,440	70,633	77,771	128,818

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
FEB 94

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	QUANTITY CURR MO CURR YR	QUANTITY YR TDT LAST YR	QUANTITY YR TDT CURR YR	QUANTITY LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	VALUE CURR MO CURR YR	VALUE YR TDT LAST YR	VALUE YR TDT CURR YR	VALUE LAST YEAR
CANNED VEGETABLES											
CND TOM PAS(JUL)	MT										
CANADA		4,664	2,222	31,953	28,764	46,004	4,110	1,983	26,251	24,855	38,098
KOREA, REPUBLIC		56	493	3,674	3,489	4,638	50	413	3,078	3,233	3,875
JAPAN		19	924	2,175	5,859	3,835	12	540	1,584	4,957	2,842
PHILIPPINES		938	34	2,763	2,461	3,517	643	28	1,923	1,767	2,434
OTHER		503	849	5,063	15,030	8,816	438	726	4,060	11,567	7,157
Subtotal:-----		6,179	4,523	45,629	55,603	66,811	5,252	3,691	36,896	46,380	54,406
CND TOM SAUCE(JUL)	MT										
CANADA		3,997	3,798	28,363	31,264	46,201	4,107	3,969	28,544	31,913	45,466
MEXICO		329	560	3,618	3,767	6,169	214	384	2,322	2,477	3,913
JAPAN		386	352	3,824	3,537	5,500	277	455	3,466	3,802	4,941
OTHER		400	851	7,849	8,862	11,559	606	1,113	7,939	9,707	11,773
Subtotal:-----		5,111	5,561	43,654	47,430	69,428	5,204	5,922	42,270	47,899	66,093
FRZN VEGETABLES											
FZN SWT CORN(JUL)	MT										
JAPAN		2,095	2,417	23,226	27,519	35,306	1,779	2,191	20,163	24,444	30,277
AUSTRALIA		294	369	4,028	4,380	5,498	276	310	3,011	3,285	4,164
HONG KONG		256	217	3,387	3,097	4,516	157	193	2,329	2,304	3,163
MEXICO		323	271	2,230	1,555	3,366	219	173	1,434	999	2,114
CANADA		231	381	2,437	1,772	3,041	164	324	1,759	1,410	2,133
OTHER		799	379	5,188	4,885	8,026	735	374	4,210	4,403	6,687
Subtotal:-----		3,998	4,036	40,495	43,209	59,754	3,330	3,565	32,906	36,844	48,538
FZN F FRY(JUL)	MT										
JAPAN		10,273	11,345	79,945	86,370	123,736	6,987	8,237	55,440	60,810	86,084
KOREA, REPUBLIC		1,312	1,404	8,399	10,636	13,959	973	1,012	6,574	7,040	10,376
HONG KONG		797	614	7,053	7,702	11,260	498	408	4,422	4,973	7,107
OTHER		4,199	5,413	36,162	49,195	53,587	3,176	4,194	26,756	36,171	40,111
Subtotal:-----		16,580	18,776	131,559	153,904	202,543	11,634	13,851	93,191	108,994	143,678
TREE NUTS											
ALMONDS UNSH(JUL)	MT										
INDIA		646	224	7,386	3,319	8,926	922	823	11,028	9,583	14,037
JAPAN		210	648	2,608	4,081	3,905	571	1,575	7,504	9,849	11,168
EU		76	0	859	669	1,108	226	0	1,367	1,232	1,832
OTHER		94	2	1,945	1,506	2,374	278	13	4,243	3,681	5,626
Subtotal:-----		1,025	874	12,799	9,576	16,313	1,997	2,411	24,141	24,344	32,664
ALMND SH/PREP(JUL)	MT										
EU		10,117	7,090	72,713	62,169	95,640	33,320	34,350	235,744	270,257	316,044
GERMANY		5,591	2,799	36,986	29,417	47,451	17,896	12,645	115,620	125,617	151,505
JAPAN		1,543	989	14,615	14,535	19,947	5,936	5,638	53,792	73,287	74,387
UNITED KINGDOM		1,267	898	9,290	8,271	12,584	4,193	4,520	29,767	33,791	40,895
NETHERLANDS		1,342	835	9,520	7,353	12,274	4,835	4,048	34,359	33,959	44,608
CANADA		692	385	7,070	7,112	9,996	2,449	1,657	24,092	28,317	34,463
OTHER		3,415	2,319	31,072	30,508	42,887	10,080	10,175	99,667	128,717	139,537
Subtotal:-----		15,767	10,784	125,471	114,324	168,469	51,784	51,820	413,294	500,578	564,432
WALNUTS SH(AUG)	MT										
EU		110	99	8,032	6,192	8,339	302	404	20,018	13,132	20,982
JAPAN		126	264	1,986	3,021	3,843	636	1,311	8,671	16,299	16,726
GERMANY		37	20	3,005	810	3,280	221	28	6,314	2,011	7,106
CANADA		275	64	1,738	1,280	2,353	1,366	253	7,059	4,108	9,456
SPAIN		0	43	1,787	1,165	1,807	0	210	4,715	3,186	4,833
ITALY		0	0	1,013	2,046	1,013	0	0	2,074	3,736	2,074
OTHER		394	519	3,212	3,367	4,023	1,466	2,317	10,813	14,057	14,533
Subtotal:-----		905	946	14,967	13,859	18,558	3,770	4,285	46,561	47,596	61,696
WALNUTS UNSH(AUG)	MT										
EU		38	688	30,594	35,098	30,827	80	1,197	61,261	66,688	61,544
SPAIN		19	216	9,993	9,515	9,993	39	351	19,606	18,020	19,606
GERMANY		0	130	6,589	8,071	6,675	0	236	13,403	15,287	13,521
NETHERLANDS		0	20	5,541	8,517	5,551	0	34	11,599	16,295	11,635
ITALY		0	245	4,501	5,562	4,501	0	442	8,853	10,790	8,853
OTHER		163	196	5,436	6,751	6,371	455	443	11,868	14,376	13,918
Subtotal:-----		202	884	36,030	41,850	37,199	535	1,640	73,129	81,064	75,463
HOPS&PRODUCTS											
HOP PELTS(SEP)	MT										
BRAZIL		0	197	708	497	1,369	0	963	3,229	2,443	6,191
CANADA		55	65	364	511	1,041	405	473	2,504	3,461	7,124
EU		237	13	486	359	724	1,007	95	2,648	2,386	4,588
MEXICO		0	0	127	0	483	0	0	844	0	3,291
COLOMBIA		0	0	443	54	443	0	0	3,510	322	3,510
GERMANY		194	3	301	51	335	795	21	1,606	341	1,819
OTHER		67	256	751	602	1,053	313	888	4,297	2,676	5,984
Subtotal:-----		360	531	2,880	2,022	5,113	1,724	2,419	17,032	11,289	30,688
HOP EXTRACT(SEP)	MT										
EU		123	110	965	690	1,458	2,529	1,368	14,859	10,994	24,964
GERMANY		60	16	509	266	710	1,240	342	8,507	3,494	11,849
MEXICO		225	416	569	1,364	706	2,637	2,536	10,735	9,558	12,127
BRAZIL		0	22	349	265	402	0	290	2,111	2,920	3,040
NETHERLANDS		13	33	136	130	278	299	296	1,873	3,686	5,119
KOREA, REPUBLIC		10	0	65	37	258	165	0	997	869	2,668
OTHER		112	169	640	668	1,081	2,310	2,969	14,477	13,620	22,356
Subtotal:-----		469	718	2,588	3,024	3,905	7,641	7,162	43,179	37,960	65,154
HOPS,NSPF(SEP)	MT										
EU		447	66	1,635	785	2,073	2,435	239	8,814	3,638	10,842
GERMANY		439	61	1,262	510	1,662	2,386	209	6,595	2,060	8,379
UNITED KINGDOM		8	5	281	268	305	49	30	1,698	1,468	1,856
JAPAN		1	63	204	160	206	6	370	1,143	958	1,149
OTHER		24	76	222	202	333	162	746	2,544	2,185	4,091
Subtotal:-----		472	205	2,062	1,147	2,612	2,602	1,355	12,501	6,781	16,082
WINE											
GRAPE WINE(JAN)	KL										
EU		2,807	1,279	5,765	3,244	45,115	3,909	2,542	7,868	6,283	66,545
CANADA		2,769	2,081	4,709	4,125	32,584	3,707	2,699	5,996	5,464	45,078
UNITED KINGDOM		1,068	431	2,520	1,349	24,121	1,774	1,040	3,793	2,888	38,803
JAPAN		706	942	1,584	1,678	12,347	1,083	1,404	2,463	2,617	17,774
DENMARK		687	201	1,140	351	6,559	613	240	942	388	6,312
OTHER		2,417	2,702	3,848	4,971	26,903	2,996	4,041	5,090	7,185	36,079
Subtotal:-----		8,699	7,004	15,906	14,019	116,948	11,694	10,686	21,418	21,549	165,476

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
FEB 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
NEW ZEALAND		0	0	284	2,296	28,513	0	0	333	2,674	30,602
CANADA		4,349	2,748	31,656	24,574	46,611	1,455	1,433	11,189	10,735	16,772
OTHER		132	325	5,194	10,852	35,277	37	185	3,067	6,274	18,006
Subtotal:-----		4,482	3,073	37,134	37,722	110,401	1,491	1,617	14,589	19,683	65,380
FR PEARS(JUL)	MT										
CHILE		15,435	15,056	16,404	16,280	44,689	5,163	5,133	5,525	5,524	14,858
ARGENTINA		2,980	3,042	2,980	3,042	14,604	1,729	1,802	1,729	1,802	9,230
OTHER		112	41	2,178	1,879	5,479	144	140	5,214	5,035	8,178
Subtotal:-----		18,526	18,139	21,562	21,201	64,772	7,037	7,074	12,469	12,362	32,266
APRICOT (MAY)	MT										
CHILE		0	0	699	781	699	0	0	441	489	441
NEW ZEALAND		79	58	144	157	158	204	113	378	283	405
OTHER		18	1	38	66	55	40	3	92	111	132
Subtotal:-----		96	59	880	1,005	911	244	116	912	883	978
PEACH-NEC(MAY)	MT										
CHILE		12,268	12,643	33,885	38,281	40,869	7,829	8,439	21,463	24,617	25,810
OTHER		28	13	909	226	1,088	28	25	663	208	997
Subtotal:-----		12,295	12,656	34,794	38,507	41,956	7,857	8,465	22,126	24,825	26,807
PLUM-PRUNE(MAY)	MT										
CHILE		7,550	6,927	16,117	14,795	23,893	4,781	4,722	10,218	9,832	15,116
OTHER		17	1	98	99	98	10	2	80	102	80
Subtotal:-----		7,567	6,928	16,215	14,893	23,990	4,791	4,724	10,298	9,934	15,196
FRESH GRAPES (MAY)	MT										
CHILE		77,316	64,817	152,480	136,482	284,846	54,835	47,292	115,475	107,169	207,103
MEXICO		0	0	37,056	41,305	37,056	0	0	67,144	55,211	67,144
OTHER		146	360	1,920	969	2,023	95	240	775	671	854
Subtotal:-----		77,462	65,177	191,456	178,755	323,924	54,930	47,532	183,394	163,050	275,101
FR RASPBRY(JAN)	MT										
CANADA		0	0	0	0	5,122	0	0	0	0	9,292
OTHER		190	223	233	292	774	301	352	387	481	1,484
Subtotal:-----		190	223	233	292	5,896	301	352	387	481	10,776
FR STRAWBRIS(JAN)	MT										
MEXICO		1,021	1,529	2,085	3,052	12,747	1,839	3,857	3,645	7,546	17,985
OTHER		54	27	216	91	1,480	106	44	392	195	3,491
Subtotal:-----		1,075	1,556	2,302	3,143	14,227	1,945	3,901	4,038	7,742	21,476
FR BANANA(JAN)	MT										
COSTA RICA		78,455	46,205	166,849	114,148	922,519	23,237	13,064	48,273	32,042	272,504
ECUADOR		57,323	73,007	119,137	135,253	761,367	15,719	18,895	32,582	34,658	205,877
COLOMBIA		45,449	44,326	92,333	95,888	596,321	13,236	12,837	26,053	27,872	166,146
OTHER		91,271	88,811	170,911	192,150	1,232,936	26,474	21,024	47,839	45,763	350,376
Subtotal:-----		272,498	252,348	549,230	537,439	3,513,144	78,665	65,821	154,747	140,336	994,903
FR MANGO(JAN)	MT										
MEXICO		353	817	353	817	94,439	269	787	269	787	71,626
OTHER		714	741	2,892	2,297	16,518	863	824	3,414	2,672	15,619
Subtotal:-----		1,067	1,558	3,244	3,114	110,957	1,132	1,611	3,683	3,458	87,245
FR PINAPLE(JAN)	MT										
COSTA RICA		5,600	4,782	10,405	10,495	72,226	2,357	1,911	4,566	4,314	30,880
HONDURAS		2,294	2,809	3,593	5,504	26,273	606	773	943	1,514	7,482
OTHER		2,463	808	5,589	1,417	25,896	622	258	1,389	449	6,986
Subtotal:-----		10,358	8,399	19,586	17,416	124,395	3,586	2,942	6,898	6,277	45,348
FR CANTLPE(MAY)	MT										
MEXICO		5,196	3,402	71,861	34,461	104,864	1,091	623	22,525	10,346	29,666
COSTA RICA		8,191	8,715	13,409	18,793	35,094	4,299	3,725	6,959	8,547	19,796
HONDURAS		9,547	12,080	38,346	35,440	55,437	2,596	2,700	10,212	8,232	14,510
OTHER		3,675	3,011	28,796	33,359	45,451	848	755	6,954	9,563	11,533
Subtotal:-----		26,609	27,209	152,413	122,053	240,846	8,834	7,804	46,651	36,688	75,505
FR MELON,OT(MAY)	MT										
MEXICO		4,075	2,259	40,667	32,926	51,787	1,360	840	14,811	11,710	17,944
COSTA RICA		2,362	5,550	4,599	7,427	24,845	1,217	2,273	2,434	3,055	11,269
OTHER		7,053	6,044	28,404	29,113	45,268	2,297	1,959	8,966	9,957	14,826
Subtotal:-----		13,490	13,852	73,670	69,466	121,899	4,875	5,072	26,212	24,722	44,039
FR ORANGES(NOV)	MT										
AUSTRALIA		0	0	0	0	4,556	0	0	0	2	6,267
OTHER		1,465	673	2,409	2,379	5,795	646	362	1,006	1,175	2,007
Subtotal:-----		1,465	673	2,409	2,379	10,350	646	362	1,006	1,180	8,274
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EU		1,490	3,238	2,683	4,853	19,589	1,461	2,459	2,590	3,734	18,494
SPAIN		1,490	3,105	2,683	4,720	19,569	1,461	2,337	2,589	3,612	18,474
CHINA, PEOPLES R		1,203	704	2,064	1,840	19,713	1,038	508	1,737	1,355	16,285
OTHER		14	45	119	75	988	27	48	135	71	1,163
Subtotal:-----		2,708	3,988	4,866	6,768	40,290	2,526	3,015	4,462	5,160	35,942
CND BLK OLV(NOV)	MT										
EU		662	1,156	3,264	4,771	12,275	1,408	2,188	7,181	8,848	24,927
SPAIN		486	977	2,745	3,983	10,260	1,000	1,799	5,727	7,043	19,913
MOROCCO		215	61	1,173	711	2,661	395	111	2,114	1,223	4,733
OTHER		0	14	45	61	125	0	23	72	115	236
Subtotal:-----		877	1,230	4,482	5,542	15,061	1,803	2,322	9,367	10,187	29,896
CND GRN OLV(NOV)	MT										
EU		1,701	1,843	12,977	11,755	41,192	4,208	4,855	34,562	29,545	104,739
SPAIN		1,676	1,761	12,667	11,449	40,160	4,149	4,710	34,046	29,012	102,781
OTHER		161	125	638	665	2,058	218	137	1,033	960	3,331
Subtotal:-----		1,862	1,968	13,615	12,420	43,249	4,426	4,992	35,595	30,505	108,070
CND PEACH(JUN)	MT										
EU		1,007	584	17,841	12,944	20,063	627	356	12,344	7,470	13,745
GREECE		1,007	436	16,808	11,812	19,021	627	266	11,615	6,757	12,996
OTHER		77	303	1,541	3,983	1,858	48	164	1,149	2,044	1,363
Subtotal:-----		1,084	888	19,382	16,927	21,921	675	521	13,494	9,515	15,109
CND PINAPLE(JAN)	MT										
THAILAND		13,412	15,757	30,494	29,716	172,014	8,553	8,125	19,759	15,370	101,834
PHILIPPINES		9,931	10,115	21,017	26,005	128,465	6,897	6,731	14,646	17,696	88,280
OTHER		2,609	3,857	5,602	7,027	41,758	1,241	1,275	2,694	2,677	16,877
Subtotal:-----		25,953	29,729	57,113	62,747	342,237	16,691	16,131	37,098	35,744	206,991
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		521	897	6,593	6,067	10,217	1,140	2,510	15,489	15,399	23,134
OTHER		27	33	201	372	299	75	61	467	876	729
Subtotal:-----		548	930	6,795	6,439	10,516	1,215	2,571	15,956	16,275	23,863

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
FEB 94

COMMODITY AND COUNTRY COUNTRY REGION		QUANTITY CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TOT CURR YR	LAST YEAR
DRIED FRUIT											
DATES(SEP)	MT										
PAKISTAN		664	451	1,892	1,467	3,720	690	493	2,079	1,598	4,036
CHINA, PEOPLES R		72	59	419	270	1,090	41	65	480	366	1,152
OTHER		100	0	409	255	689	155	0	769	562	1,330
Subtotal:-----		835	510	2,720	1,991	5,498	886	557	3,328	2,526	6,518
DRD FIG(SEP)	MT										
EU		0	0	967	761	969	0	0	2,398	1,820	2,403
GREECE		0	0	942	727	943	0	0	2,296	1,695	2,301
TURKEY		44	88	322	758	1,240	36	108	665	1,231	1,300
OTHER		2	0	356	1,209	562	2	0	172	576	266
Subtotal:-----		46	88	1,645	2,728	2,771	39	108	3,236	3,627	3,969
DRD RAISIN(AUG)	MT										
MEXICO		149	129	3,257	3,413	3,662	109	142	2,186	3,151	2,508
CHILE		0	0	369	507	1,441	0	0	433	618	1,774
TURKEY		33	164	850	1,650	1,526	36	179	920	1,665	1,655
OTHER		0	38	24	223	87	0	47	50	273	134
Subtotal:-----		181	330	4,500	5,793	6,717	145	368	3,590	5,707	6,070
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
EU		19,621	28,574	130,331	146,029	229,468	5,881	5,328	42,869	31,432	69,762
ARGENTINA		447	2,014	132,302	216,402	222,727	96	376	40,654	40,682	58,379
GERMANY		16,688	23,932	109,683	113,056	186,794	5,095	4,527	34,711	24,551	56,118
OTHER		21,019	20,760	267,575	336,407	369,967	7,388	3,881	91,004	69,728	118,171
Subtotal:-----		41,087	51,348	530,208	698,837	822,162	13,364	9,585	174,527	141,843	246,312
FCOJ(DEC)	KL										
BRAZIL		68,486	102,537	230,994	335,692	1,089,726	10,780	18,873	37,692	62,856	190,381
OTHER		9,985	21,830	21,806	41,693	137,517	1,996	5,181	4,484	9,608	25,686
Subtotal:-----		78,470	124,368	252,800	377,385	1,227,243	12,776	24,054	42,177	72,464	216,066
GRAPE JU(JAN)	KL										
SWEDEN		3,630	0	11,819	0	51,169	1,346	0	4,059	0	16,067
EU		165	1,212	424	3,089	24,178	79	725	266	1,654	8,460
OTHER		3,155	1,208	9,225	2,920	54,769	1,319	572	3,700	1,186	19,669
Subtotal:-----		6,951	2,420	21,468	6,009	130,116	2,745	1,297	8,025	2,840	44,196
PNEAPL JUCN(JAN)	KL										
THAILAND		15,501	10,919	29,253	26,723	156,558	2,962	1,912	5,947	4,953	30,322
PHILIPPINES		8,119	10,163	19,035	19,318	113,215	1,739	1,733	4,156	3,702	23,255
OTHER		1,889	2,152	3,965	3,331	24,227	557	471	1,168	822	6,782
Subtotal:-----		25,510	23,234	52,253	49,372	294,000	5,258	4,116	11,271	9,477	60,359
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		2,480	3,269	6,539	9,301	29,454	919	1,032	2,428	3,267	10,933
OTHER		1,011	2,411	2,596	3,892	13,450	241	919	856	1,473	4,309
Subtotal:-----		3,491	5,680	9,135	13,193	42,904	1,160	1,951	3,284	4,740	15,242
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		2,145	1,259	3,843	2,437	18,446	1,994	1,153	3,943	2,345	17,277
OTHER		82	61	408	246	1,274	621	262	1,435	814	3,826
Subtotal:-----		2,227	1,320	4,251	2,683	19,720	2,615	1,415	5,378	3,159	21,103
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		1,971	2,108	8,551	6,721	11,424	2,163	2,836	10,659	9,021	14,214
OTHER		6	106	87	242	729	7	63	138	167	783
Subtotal:-----		1,977	2,214	8,638	6,963	12,152	2,169	2,899	10,797	9,188	14,998
FR CARROT(OCT)	MT										
CANADA		2,885	3,412	28,620	31,628	39,943	910	710	7,412	7,425	10,429
MEXICO		1,483	874	4,648	5,493	10,923	477	252	1,225	1,138	3,267
OTHER		110	20	300	102	566	53	8	183	55	370
Subtotal:-----		4,479	4,305	33,568	37,224	51,432	1,440	969	8,820	8,617	14,067
FR CABBAGE(OCT)	MT										
CANADA		1,260	616	7,872	6,609	17,625	260	139	1,558	1,573	4,420
MEXICO		1,071	536	2,955	2,706	8,318	229	101	586	445	1,542
OTHER		4	0	30	143	871	8	0	25	42	565
Subtotal:-----		2,335	1,152	10,856	9,458	26,815	496	239	2,168	2,060	6,526
FR CELERY(OCT)	MT										
MEXICO		3,397	1,897	5,708	4,674	11,581	1,551	529	2,394	1,400	4,719
CANADA		0	0	614	381	4,643	0	0	142	122	1,340
OTHER		108	0	232	60	600	18	0	40	19	117
Subtotal:-----		3,506	1,897	6,553	5,116	16,823	1,569	529	2,575	1,541	6,176
FR CUCMBR(OCT	MT										
MEXICO		41,630	45,072	148,538	147,599	213,505	12,830	20,878	48,633	68,228	76,639
OTHER		5,618	6,624	16,283	12,720	25,337	1,209	1,296	4,036	3,355	8,554
Subtotal:-----		47,248	51,695	164,821	160,318	238,842	14,038	22,174	52,669	71,582	85,192
FR CAULFLWR(OCT)	MT										
CANADA		0	0	93	536	3,018	0	0	26	174	998
MEXICO		214	182	428	1,316	666	109	53	182	389	319
OTHER		0	0	0	0	192	0	0	0	0	133
Subtotal:-----		214	182	521	1,852	3,876	109	53	207	564	1,449
FR GARLIC(OCT)	MT										
MEXICO		253	40	310	150	10,500	410	18	547	166	11,055
CHINA, PEOPLES R		228	1,243	953	12,959	14,338	215	688	763	6,331	7,236
OTHER		959	1,338	1,824	2,105	4,333	1,244	1,694	2,130	2,520	4,854
Subtotal:-----		1,440	2,621	3,086	15,215	29,172	1,869	2,400	3,441	9,016	23,145
FR ONION(OCT)	MT										
MEXICO		22,767	18,388	64,017	60,706	192,287	9,255	15,677	40,569	47,584	93,837
OTHER		2,414	16,573	8,225	37,891	24,451	980	5,992	3,404	13,769	10,015
Subtotal:-----		25,181	34,960	72,242	98,597	216,739	10,235	21,668	43,973	61,354	103,853
FR PEPPERS(OCT)	MT										
MEXICO		25,227	26,060	81,240	76,759	138,708	19,423	24,714	72,676	76,661	134,106
EU		3	3	2,878	4,677	16,090	5	4	8,152	11,098	37,118
NETHERLANDS		1	0	2,779	4,530	15,624	3	0	7,866	10,659	35,960
OTHER		112	36	663	765	3,994	54	48	854	1,257	6,733
Subtotal:-----		25,343	26,099	84,781	82,203	158,793	19,482	24,766	81,682	89,016	177,957
FR SEED POT(OCT)	MT										
CANADA		7,598	12,588	20,288	29,460	74,524	885	2,497	2,734	5,290	11,499
OTHER		12	11	36	47	137	7	6	18	27	81
Subtotal:-----		7,610	12,599	20,323	29,506	74,661	892	2,502	2,752	5,317	11,579
FR TBL POT(OCT)	MT										
CANADA		25,004	22,925	103,909	117,705	227,512	3,829	5,626	15,781	26,796	38,014
OTHER		0	0	13	38	13	0	0	3	18	3
Subtotal:-----		25,004	22,925	103,922	117,743	227,525	3,829	5,626	15,784	26,814	38,017

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
FEB 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH VEGETABLES											
FR TOMATO(OCT)	MT										
MEXICO		70,006	62,537	152,112	171,252	365,168	53,032	89,456	132,978	183,350	289,182
OTHER		935	385	3,302	5,324	15,744	467	174	2,873	6,171	18,273
Subtotal:-----		70,942	62,922	155,414	176,577	380,912	53,499	89,630	135,851	189,520	307,454
FR ASPARG(OCT)	MT										
MEXICO		7,584	3,757	11,550	7,454	22,613	11,817	6,634	18,490	13,260	31,593
OTHER		88	50	5,147	6,389	7,239	130	91	5,487	7,958	7,620
Subtotal:-----		7,672	3,807	16,697	13,844	29,852	11,947	6,725	23,977	21,218	39,213
CANNED VEGETABLES											
CND TOM PST(JUL)	MT										
MEXICO		0	0	0	193	20,312	0	0	0	129	14,818
CHILE		59	39	5,323	949	7,176	43	28	2,900	651	4,122
OTHER		168	346	3,070	4,729	3,881	159	228	2,137	3,024	2,789
Subtotal:-----		227	384	8,393	5,871	31,369	202	257	5,037	3,804	21,730
CND TOM SAUCE(JUL)	MT										
CANADA		255	480	2,989	3,350	4,465	145	304	1,625	2,118	2,499
CHILE		6	16	183	421	2,239	3	6	78	256	1,325
DOMINICAN REPUBL		80	62	1,225	469	1,627	53	42	793	328	1,050
OTHER		182	357	1,217	1,929	1,552	97	532	871	1,366	1,115
Subtotal:-----		523	914	5,614	6,169	9,883	297	884	3,367	4,069	5,989
CND TOMATO(JUL)	MT										
CHILE		190	36	9,736	5,417	16,630	96	20	3,935	2,650	7,462
EU		1,685	1,163	12,088	11,174	16,765	532	386	4,634	3,475	6,087
ITALY		1,540	1,146	10,951	10,985	15,560	486	380	3,968	3,407	5,398
OTHER		567	529	10,069	10,605	11,901	275	245	3,631	3,843	4,363
Subtotal:-----		2,443	1,728	31,893	27,196	45,297	903	652	12,200	9,968	17,912
CND MSHROOM(JUL)	MT										
INDONESIA		1,244	478	11,496	5,854	15,958	2,698	1,019	29,152	12,880	39,390
CHINA, PEOPLES R		532	1,713	7,812	9,815	11,240	901	2,195	13,915	16,490	19,532
OTHER		1,720	3,167	13,966	14,335	21,018	3,836	6,163	31,043	32,208	45,934
Subtotal:-----		3,496	5,358	33,274	30,004	48,216	7,436	9,377	74,109	61,578	104,856
FROZEN VEGETABLES											
FZN BROCLI(SEP)	MT										
MEXICO		15,490	12,659	85,240	50,294	159,838	10,288	8,966	56,331	34,857	106,192
OTHER		1,224	1,411	10,567	12,234	15,408	754	936	7,752	7,969	10,933
Subtotal:-----		16,715	14,070	95,807	62,529	175,246	11,041	9,901	64,082	42,825	117,125
FZN CAULFLR(SEP)	MT										
MEXICO		1,211	3,429	17,973	23,530	20,199	913	2,826	12,776	20,853	14,433
OTHER		118	378	868	1,938	1,899	86	172	603	911	1,249
Subtotal:-----		1,329	3,806	18,841	25,468	22,097	999	2,998	13,379	21,764	15,682
FZN POTATO(SEP)	MT										
CANADA		9,664	10,535	51,132	61,773	121,553	5,531	6,063	28,669	34,492	66,834
OTHER		0	73	166	176	402	0	42	111	152	259
Subtotal:-----		9,664	10,608	51,298	61,950	121,956	5,531	6,105	28,781	34,644	67,093
TREE NUTS											
PISTACHIO NSH(SEP)	MT										
HONG KONG		0	0	0	15	40	0	0	0	35	81
TURKEY		0	15	7	105	7	0	42	24	288	24
OTHER		0	0	0	0	0	0	0	0	1	2
Subtotal:-----		0	15	7	120	47	0	42	24	324	107
CASHEW NUT(AUG)	MT										
INDIA		2,646	2,794	20,677	22,557	31,066	11,363	11,673	91,440	94,112	136,033
BRAZIL		1,504	1,415	17,709	12,805	27,735	6,377	7,372	69,249	54,505	109,075
OTHER		511	574	4,138	2,637	5,845	1,802	1,879	13,568	8,940	19,312
Subtotal:-----		4,661	4,784	42,524	37,998	64,645	19,542	20,924	174,257	157,558	264,421
FILBERTS(AUG)	MT										
TURKEY		274	251	2,613	2,402	3,944	700	929	6,946	7,578	10,245
OTHER		6	3	51	91	77	27	16	215	263	300
Subtotal:-----		280	255	2,663	2,493	4,022	727	946	7,162	7,841	10,544
PECANS NSH(SEP)	MT										
MEXICO		238	1,402	12,519	4,181	12,772	670	1,294	33,233	4,907	33,861
OTHER		0	0	148	327	148	0	0	449	1,081	449
Subtotal:-----		238	1,402	12,668	4,508	12,920	670	1,294	33,683	5,988	34,310
WINES											
CHMP&SPRK WN(JAN)	KL										
EU		1,026	1,036	2,076	2,296	30,523	9,911	10,577	18,060	20,439	265,363
FRANCE		423	407	700	821	10,065	7,626	8,097	12,411	14,159	179,059
ITALY		321	330	685	869	11,753	1,296	1,318	3,025	3,884	50,998
OTHER		14	15	22	38	302	80	40	117	103	1,034
Subtotal:-----		1,040	1,051	2,099	2,334	30,825	9,990	10,617	18,177	20,542	266,397
FT&VERM WN(JAN)	KL										
EU		592	584	1,118	1,541	12,389	2,299	2,028	4,028	5,724	48,713
ITALY		259	340	503	848	6,954	530	748	1,086	2,039	16,829
SPAIN		226	126	440	455	3,278	1,108	378	1,791	2,008	14,484
PORTUGAL		48	75	89	143	1,295	446	771	854	1,330	13,324
OTHER		16	9	31	19	159	58	46	125	92	671
Subtotal:-----		608	593	1,149	1,560	12,547	2,357	2,074	4,153	5,817	49,384
OTH GP WINE(JAN)	KL										
EU		7,844	9,872	14,024	20,428	152,864	27,516	32,160	51,950	65,004	553,012
FRANCE		3,053	3,560	5,164	6,636	55,169	15,897	17,587	30,079	32,359	303,623
ITALY		3,671	4,881	6,809	10,868	75,390	8,556	11,057	16,485	25,144	186,307
OTHER		3,714	2,958	6,285	5,853	42,637	7,336	6,563	12,798	13,778	97,598
Subtotal:-----		11,558	12,830	20,310	26,281	195,502	34,852	38,723	64,748	78,782	650,610
OTH WN PROD(JAN)	KL										
JAPAN		171	129	397	281	2,276	455	531	1,180	1,000	7,018
EU		148	280	425	776	3,709	196	385	623	1,048	5,144
CANADA		16	205	40	432	2,084	34	225	64	507	2,953
OTHER		58	72	134	193	1,148	130	124	285	357	2,121
Subtotal:-----		394	686	995	1,680	9,216	814	1,265	2,151	2,913	17,236
CUT FLOWERS											
ROSES(JAN)	NONE										
COLOMBIA		0	0	0	0	0	14,357	13,667	23,026	22,989	80,312
OTHER		0	0	0	0	0	5,761	7,712	7,940	10,278	27,079
Subtotal:-----		0	0	0	0	0	20,118	21,379	30,966	33,267	107,392
CARNATIONS(JAN)	NONE										
COLOMBIA		0	0	0	0	0	7,383	6,943	16,193	15,291	82,941
OTHER		0	0	0	0	0	160	246	317	382	2,143
Subtotal:-----		0	0	0	0	0	7,542	7,189	16,510	15,674	85,084

FAS Publications: Market Information for Agricultural Exporters

As an agricultural exporter, you need timely, reliable information on changing consumer preferences, needs of foreign buyers, and the supply and demand situation in countries around the world. The Foreign Agricultural Service provides that information in its commodity publications. For a sample copy of these reports, check the appropriate blank below, fill out the address form, and mail it today.

To subscribe: Indicate which publications you want. Send a check for the total amount payable to the Foreign Agricultural Service. Only checks on U.S. banks, cashier's checks, or international money orders will be accepted. NO REFUNDS CAN BE MADE. Mail form to: Foreign Agricultural Service, Information Division, Ag Box 1006, Washington, DC 20250-1006.

No. of Subscriptions			Subscription Rate Domestic	Foreign Airmail
_____	10002	Agricultural Trade Highlights (12 issues)	$25.00	$40.00
_____	10003	Tropical Products (Coffee, Tea, Cocoa, Spices, Essential Oils) (4 issues)	11.00	18.00
_____	10004	Cotton: World Markets and Trade (12 issues)	30.00	66.00
_____	10005	Dairy, Livestock and Poultry: U.S. Trade and Prospects (12 issues)	39.00	87.00
_____	10006	Dairy Monthly Imports (12 issues)	25.00	40.00
_____	10007	Dairy: World Markets and Trade (2 issues)	7.00	11.00
_____	10008	Livestock and Poultry: World Markets and Trade (2 issues)	7.00	11.00
_____	10009	All 28 Dairy, Livestock and Poultry Reports	68.00	139.00
_____	10010	Grain: World Markets and Trade (12 issues)	30.00	66.00
_____	10015	World Horticultural Trade and U.S. Export Opportunities (12 issues)	30.00	66.00
_____	10016	Oilseeds: World Markets and Trade (12 issues)	38.00	95.00
_____	10017	U.S. Planting Seed Exports (4 issues)	19.00	48.00
_____	10018	Sugar: World Markets and Trade (2 issues)	5.00	8.00
_____	10020	Tobacco: World Markets and Trade (12 issues)	33.00	77.00
_____	10021	World Agricultural Production (12 issues)	38.00	95.00
_____	10023	Wood Products: International Trade and Foreign Markets (5 issues)	21.00	46.00
_____	10024	Monthly Summary of Export Credit Guarantee Program Activity (12 issues)	22.00	32.00
_____	10025	U.S. Export Sales (52 issues)	87.00	160.00

Total Reports Ordered _____ **Total Subscription Price**_________

_____ Please send me a sample copy.

Enclosed is my check for $ _______ made payable to the Foreign Agricultural Service.

Name (LAST, first, middle initial)

Organization or firm

Street or P.O. Box Number

City State Zip Code

Country Phone Number ( )

UNITED STATES DEPARTMENT OF AGRICULTURE
Foreign Agricultural Service
Room 4644-S
WASHINGTON, D.C. 20250-1000

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, $300

FIRST-CLASS MAIL
POSTAGE & FEES PAID
USDA-FAS
WASHINGTON, D.C.
PERMIT No. G-262

If your address should be changed __________ PRINT OR TYPE the new address, including ZIP CODE and return the whole sheet and/or envelope to:

FOREIGN AGRICULTURAL SERVICE, Room 4644 So.
U.S. Department of Agriculture
Washington, D.C. 20250.